Advisory Council for Aging & Independence Services
Affordability in Aging
(Subcommittee Name)
5/12/2025 | 10:30am
Date Time
5560 Overland Ave, Suite 310, San Diego, CA 92123

COSD CLERK OF THE BOARD
2025 JUN 6 PM12:16

MINUTES

	Members	Absent Members	Guests
Attendance:	Sylvia Martinez Smith Sirisakorn David Milroy Molly Nocon Ted Kagan	Dennis Leggit	Susan Mallett Allison Boyer
	Staff		
	N/A		

Item	Outcome
1. Call to Order	**David Milroy, called meeting to order at: 10:35 AM** a. Welcome & Guest/Member Introductions b. Confirmation of Quorum = more than 3 Members Present
2. Statement (just cause) and/or Consideration of a Request to Participate Remotely (emergency circumstances) by a Council Member	N/A
3. Standard Business Names are noted when vote is not unanimous	a. Public Comments/Announcements: Minutes Approval – Motion to approve (Kagan/Sirisakorn) Unanimous
4. New Business	Topics discussed with AIS Chair, Susan Smallett and AIS Assistant Director, Allison Boyer: • Clarification of this committee's charge and how to promote our mission. 5th goal of the Master Plan on Aging is "Affordability". • Committee wants to focus on Project-based work and meet with Nutrition and Healthy Aging in a joint meeting with the Caregiver Coalition and senior food programs like Jewish Family services. • 211 accuracy and accessibility of all services for seniors • Review Area Plan 2024-2028 regarding affordability issues related to food and housing.
5. Actions Steps	1. Continue integrating and report backs. 2. Plan a joint meeting with Healthy Aging at 2:15 pm on July 14
6. Next Meeting	Date: 6/09/25 Time: 10:30-11:30 AM Location: COC, JGR
7. Adjournment	11:45 AM

Respectfully submitted by David Milroy

Advisory Council for Aging & Independence Services
HEALTHY AGING SUBCOMMITTE

COSD CLERK OF THE BOARD
2025 MAY 29 PM8:52

May 12, 2025 | 2:15pm
5560 Overland Avenue, 3rd Floor, John Gaffaney Conference Room
Call in: (619) 343-2539
Meeting ID: 210 078 344 97
Passcode: c68pX3ii

MINUTES - DRAFT

	Members	Absent Members	Guests
Attendance:	Wanda Smith, Chair Paige Colburn-Hargis Bradlyn Mulvey David Milroy Maureen Phillips Jacqueline Simon		Sally Jackson
	Staff		

Item	Outcome
1. Call to Order	Wanda Smith called the meeting at 2:14 pm a. Welcome & Guest/Member Introductions b. Confirmation of quorum (3) There was a quorum.
2. Standard Business	a. Public Comments/Announcements: none b. Approval of February 10, 2025, Meeting Minutes (Action) c. **[M/S Maureen Phillips made the motion to approve the minutes from the last meeting and Jacqueline Simon seconded the motion. Minutes were approved.**
3. General Discussion	In a hope to solicit help from Sally Jackson in developing the Aging Well Plan Map/template, our subcommittee members shared the Aging Well Plan Map. Sally shared a number of guides the County has developed that might be included in an additional level of the plan: potential resources for the Aging Well major categories. These guides included a guide for transportation, a guide to get engaged in your community, and a fall prevention resource guide. Discussion continued to refine the map by looking at the major categories that will be included in the Aging Well Plan Map: Legal/Financial Issues, Care Plan, Medical and Emergency Preparedness. Further refinement will continue at our next meeting.
4. Next Meeting	June 9, 2025, at 2:15pm at 5560 Overland Avenue, 3rd Floor, John Gaffaney Conference Room
5. Adjournment	Meeting adjourned at 3:16 pm

Respectfully submitted by Bradlyn Mulvey, Secretary

Advisory Council for Aging & Independence Services
Long Term Care Ombudsman and Facilities Subcommittee
May 12, 2025, 10:30 a.m.
5560 Overland Ave, 3rd Floor, MSSP Conference Room
San Diego, CA 92123

COSD CLERK OF THE BOARD
2025 JUN 6 PM12:16

MINUTES - DRAFT

	Members	Absent Members	Guests
Attendance:	Elaine Lewis, Chairman Bradlyn Mulvey Faye Detsky-Weil	Rhys Jones	
	Staff		
	Brittney Willis		

Item	Outcome
1. Call to Order	Elaine Lewis called the meeting at 10:37 am a. Welcome & Guest/Member Introductions b. Confirmation of quorum (3) There was a quorum.
2. Statement (just cause) and/or Consideration of a Request to Participate Remotely (emergency circumstances) by a Council Member	N/A
3. Standard Business	a. Public Comments/Announcements: Brittney shared that she and Sunita went to Sacramento to discuss budget requests and set legislative priorities for older people. Also, they shared that there can sometimes be an inconsistency between the POLST form and advanced care directives set up in one's estate planning; this conflict can cause difficulties when healthcare professional needs to make decisions about a DNR. This needs to be clarified so that patient wishes can be followed.
4. Review Discussion from Committee members	a. The subcommittee AIS goals for 2024-2027 were briefly discussed and agreed upon. b. A discussion followed about areas of complaint from seniors which centered around low staffing ratios and patient neglect and abuse. There are requirements for RN and LVN involvement which is not always met. Also, minimum CNA staffing standards are around 2.2 hours per resident per day; this is higher than a new national legislation standard. We discussed staff training that focused on client rights and offered a humane approach for interaction with clients. Some facilities exploit residents by increasing costs and providing substandard living conditions and poor food quality. c. Choose Well, a resource for finding residential care, is being cut from the budget, raising concerns about how to find appropriate placements for seniors. We discussed alternatives such as the county 211 line, The Elder Care Directory, and Jewish Family Services as potential resources to help aid in finding appropriate resources for senior placement. d. The chairman suggested the subcommittee focus on training requirements or staffing. A look at Title 22 which focuses on community care and Title 17 which focuses on healthcare could be our next area of investigation so that we can make recommendations. The chair is looking to invite speakers to address the subcommittee on training of staff.
5. Next Meeting	June 09, 2025 at 10:30 am at 5560 Overland Avenue, 3rd Floor, Joaquin Anguera Training Room
6. Adjournment	Meeting adjourned at 11:34pm

Respectfully submitted by Bradlyn Mulvey

Advisory Council for Aging & Independence Services
NUTRITION SUBCOMMITTEE
May 7, 2025 | 1 P.M.

Call in: 619-343-2538

Phone Conference ID: 728 771 44#
Meeting ID: 231 545 090 575
Passcode: m8RV9Hh9

COSD CLERK OF THE BOARD
2025 MAY 30 AM8:19

MINUTES - DRAFT

	Members	Absent Members	Guests
Attendance:	Shirley King, Chair Susan Mallett, Ex-Officio Bradlyn Mulvey Maureen Phillips	Jacqueline Simon	
	Staff		
	Delilah Bisase, R.D., Public Health Nutrition Manager		

Item	Outcome
1. Call to Order	Shirley King, Chair, 1 P.M. a. Welcome & Guest/Member Introductions b. Confirmation of quorum (Three): (Three present for a quorum)
2. Statement of (Just Cause) and/or Consideration of a request to Participate Remotely (emergency circumstances) by a Council Member, if applicable	No action taken.
3. Standard Business	a. Public Comments/Announcements: Members or non-members: Members or non-members: Maureen Phillips announced that her community center is applying for a San Diego Community Power grant (affiliated with USDA) that provides one free refrigerator. b. Approval of April 9, 2025, Meeting Minutes (Action) [M/S Susan Mallett/Bradlyn Mulvey] Unanimous vote
4.	a. Alvondra Alvarado, Executive Director and Joseph Kendrick, Research Manager with the San Diego Hunger Coalition, a non-profit organization that provides services in the form of data collection, evaluation, technical assistance and advocacy to 500 nutrition service providers in San Diego County. Services are offered in thirteen different languages. Most of the data accumulated is free for the public and other specialized data is fee-based for organizations such as Meals on Wheels and Serving Seniors. The methodology is focused on the state of not having enough food and is driven by the new standard rooted in equity. The data may undercount the number of people in need because it is largely self-reported, many responses may not reveal the complete truth. About 50% of those surveyed report not being as forthcoming and 40% report being scared to ask for help - one reason related to fear of losing children. The indicator of nutrition insecurity is calculated on a family of four earning income of less than $72,000 or 225% of the Federal Poverty Level not being able to afford three nutritious meals each day. The methodology estimates the number of meals that nutritionally insecure households can self-purchase and the remaining need to be met by food assistance. During the Covid years 22% of individuals were food insecure, as of December 2024 25% are food insecure. In the older adult category 25% of those age 60 are food insecure or one in four or 176,000 in San Diego County. For those with disabilities 36% or two in five (133,000) are food insecure. In December 2024 CalFresh represents 59% of the food assistance meals. About 30% of those eligible for CalFresh are not enrolled. If all those eligible for CalFresh were to be enrolled, food insecurity in San Diego County would be eliminated. 175,000 individuals could be enrolled. This results in $58M in lost economy. The conclusions offered by Alondra and Joseph are the systemic

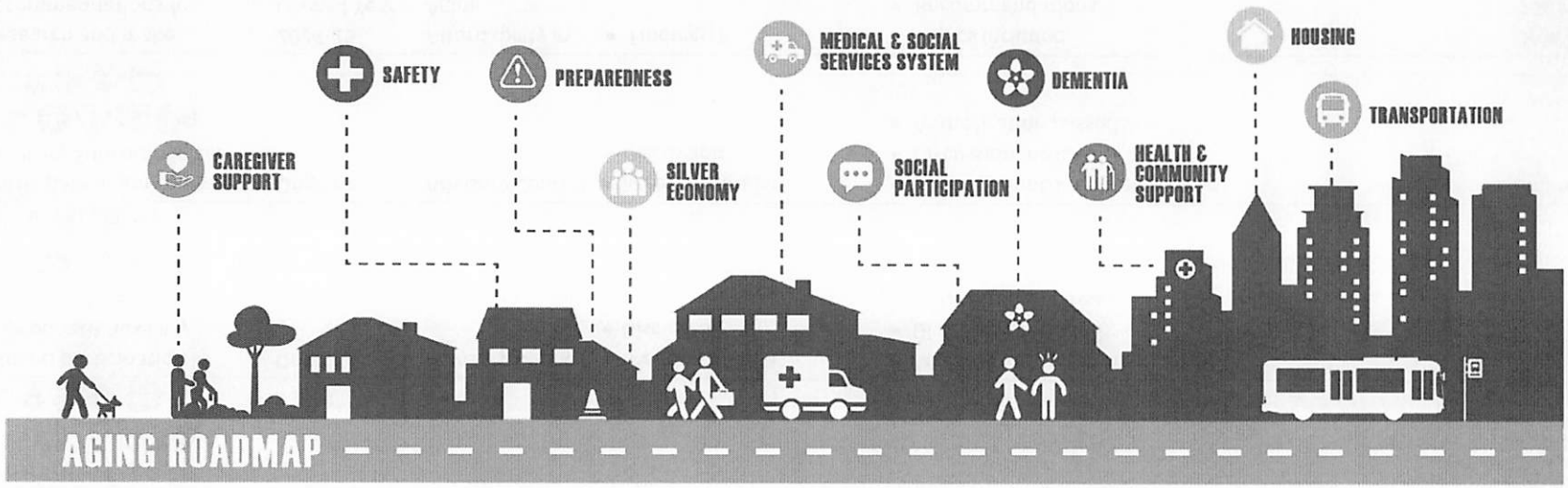
	reasons for a poor living wage for all Americans that create the basis for food insecurity. The key to the County's efforts to focus on food justice is to know where to allocate the resources. b. After the presentation, Delilah suggested that where there are food desert areas, CalFresh nutritionists can guide community programs in those areas with nutrition and meal planning. c. The subcommittee members agreed that the annual goals need to emphasize more avenues for CalFresh utilization and methods to reduce barriers. Also, the members want to focus on the rural communities and poor access to nutritious food shopping.
5. Next Meeting	June 4, 2025, 1 P.M.
6. Adjournment	Meeting adjourned at 2 P.M.

Respectfully submitted by Shirley King

APPENDIX: AGING & INDEPENDENCE SERVICES (AIS) ADVISORY COUNCIL | GOALS 2024 – 2027

COUNCIL FOCUS: Use or gain expertise to identify, project, and anticipate needs and trends, and advise on AIS operational actions to address the needs of older adults and persons with disabilities.

AGING ROADMAP: County of San Diego's regional plan that is implemented and organized by 10 focus areas that collectively represent the County's comprehensive system of care, including both person-centered and community-wide efforts. Roadmap focus areas are as follows and identified throughout the Council's Goals:



GOALS 2024 – 2027

#	Goal	Timeline	Lead	Measure	Outcome	Status
1	Advise on the 4-year Area Plan for FY 2024-2028.	Feb – May 2024	Ad Hoc Area Plan Subcommittee	• Meeting date(s) • Discussion • Vote and authorization of Council Chair to sign letter of transmittal	• Ad Hoc Area Plan Subcommittee met on 2/12/24 and 3/8/24. • Area Plan public hearing comment and consideration of acceptance during Advisory Council meeting on 3/11/24. • Discussion included: Area Plan 2024-2028 updates and process and content of the Area Plan. The Ad Hoc Subcommittee recommends continued consultation, input, and monitoring of progress from Advisory Council. Authorization passed with 18 votes on 3/11/24.	Completed

APPENDIX: AGING & INDEPENDENCE SERVICES (AIS) ADVISORY COUNCIL | GOALS 2024 – 2027

1a	Advise on Area Plan updates for FY 2024-2025. 	Feb – May 2025	Ad Hoc Area Plan Subcommittee	• Meeting date(s) • Discussion • Vote and authorization of Council Chair to sign letter of transmittal	• Discussion included:	Not yet started
2	Monitor and plan for the expansion of services for older adults to meet the needs of the growing population. 	Ongoing	Ad Hoc Area Plan Subcommittee and Advisory Council	• Discussion	• Discussion included:	In progress
3	Find engaging speakers for the AIS Advisory Council general meetings. 	Ongoing	Advisory Council	• Speakers	• Speakers' topics included:	In progress
4	Expand participation in appropriate Auxiliary Subcommittees. 	Ongoing	Advisory Council	• Meeting date(s) • Discussion	• Auxiliary Subcommittee met on: • Discussion included: • Authorization passed:	In progress
5	Participate in appropriate Ancillary Subcommittees. 	Ongoing	Advisory Council	• Meeting date(s) • Discussion	• Ancillary Subcommittee met on: • Discussion included: • Authorization passed:	In progress
6	Research and make recommendations for priority areas to support economic security amongst older adults in San Diego. 	2024-25 Council Year	Affordability in Aging Subcommittee	• Finding(s)	• Topics included: • Recommendations:	Not yet started

APPENDIX: AGING & INDEPENDENCE SERVICES (AIS) ADVISORY COUNCIL | GOALS 2024 – 2027

7	Research and make recommendations for priority areas of healthcare programs and groups for older adults. 	Ongoing	Healthy Aging Subcommittee	• Finding(s)	• Topics may include, but are not limited to, where the older adult population meets, nutrition, socialization, geography/communities, disabilities, mental health, neurodegenerative diseases of AD, PD, FTD, Dementia, ways to increase awareness and education in hospitals re: geriatric issues.	In progress
7a	Research the impacts of isolation and explore the "Seniors Who Live Alone" topic. 	Ongoing	Healthy Aging Subcommittee	• Finding(s)	• Discussion included:	In progress
8	Review how older adults who have the greatest economic or social need are made aware of and utilize nutrition services including CalFresh benefits. 	Ongoing	Nutrition Subcommittee	• Finding(s)	• Topics may include review of nutrition resources and education through the AIS website, printed materials. • Examine the barriers to CalFresh benefit enrollment and how enrollment assistance is promoted.	In progress
9	Review the research and implementation efforts of local and national 'food as medicine' initiatives that focus on the integration of food for disease prevention and management. 	Ongoing	Nutrition Subcommittee	• Finding(s)	• Topics may include, but not limited to enhancing nutritional quality through increased fruit and vegetable consumption and the importance of good nutrition for older adults living with chronic health conditions.	In progress
10	Increase awareness about good oral health and dental treatment options through public insurance benefits. 	Ongoing	Nutrition Subcommittee	• Finding(s)	• Discussion included:	In progress
11	Identify disease risk reduction strategies and educational opportunities	Ongoing	Healthy Aging Subcommittee	• Finding(s)	• Topics may include cardiac health, diabetes, oral health care and nutrition, dementia and neuro-degenerative disorders and Parkinson's disease.	In progress

APPENDIX: AGING & INDEPENDENCE SERVICES (AIS) ADVISORY COUNCIL | GOALS 2024 – 2027

	for diseases and disorders affecting older adults. 					
12	Monitor and advise on AIS programs through presentations and site visits. 	Ongoing	Nutrition Subcommittee Healthy Aging Subcommittee	• Meeting(s) and date(s) attended	• Discussion included:	In progress
12a	Congregate Meals (Title III C1) and Transportation to Dining Sites (Title III B). Review nutrition education and in-service requirements for congregate sites. 	Ongoing	Nutrition Subcommittee	• Meeting(s) and date(s) attended	• Discussion included:	In progress
12b	Home-Delivered Meals (Title III C2) 	Ongoing	Nutrition Subcommittee	• Meeting(s) and date(s) attended	• Discussion included:	In progress
12c	SNAP-Ed (Cal Fresh) 	Ongoing	Nutrition Subcommittee	• Meeting(s) and date(s) attended	• Discussion included:	In progress
12d	Older Adult Health Promotion (Feeling Fit, Fall Prevention, etc.) and Healthy Aging in life-long learning. 	Ongoing	Healthy Aging Subcommittee	• Meeting(s) and date(s) attended	• Awareness and Promotion of local programs in lifelong learning to support Healthy Aging.	In progress
13	Monitor pending legislation in all goal areas and participate with respective committees and AIS staff in analysis of legislation. 	Ongoing	Advisory Council and Ad Hoc Legislative Subcommittee	• Legislation monitored	• Discussion included: • Recommendations:	In progress
14	Monitor and make	Ongoing	Long Term Care	• Date(s) of Choose Well	• Recommendations for improvement, including assessment	In progress

APPENDIX: AGING & INDEPENDENCE SERVICES (AIS) ADVISORY COUNCIL | GOALS 2024 – 2027

	recommendations for enhancements to Choose Well. 		& Ombudsman Facilities	meeting(s) attended • Quarterly meetings.	of effectiveness or additional resources needed. • Discussion included:	
15	Advise AIS on legislation proposals and changes related to Skilled Nursing Facilities and Residential Care Facilities for the Elderly. 	Ongoing	Long Term Care & Ombudsman Facilites	• Legislation Monitored	• Raise and maintain awareness for the AIS Advisory council surrounding legislation related to skilled nursing facilities and residential care facilities for the elderly. • Discussion included:	In progress
16	Monitor and advise AIS on the Ombudsman program standard of operations, goals, performance, and increasing the number of volunteers as well as advise on areas of concern related to long term care. 	Ongoing	Long Term Care & Ombudsman Facilities	• Meeting(s) and date(s) attended	• Recommendations for improvement, including assessment of effectiveness or additional resources needed. • Discussion included:	In progress
17	Monitor and advise on success of existing technology programs and promote access to and utilization of technology. 	Ongoing	Advisory Council and All Subcommittees	• Finding(s) • Number and topic of media campaign	• Recommendations may include a media campaign to promote existing programs or identify opportunities for new programs.	Not yet started

Hunger Legislation Tracker



For CAFB's full 2025 Policy Agenda and state budget priorities, go to our Policy Page.

Bills highlighted in orange are sponsored by CAFB.

CalFresh Bills (2025):

AB 777 (C. Rodriguez) – CalFresh and Disasters

This Bill would improve California's ability to provide Disaster CalFresh and other disaster-related CalFresh provisions during natural disasters.

Sponsor(s): California Association of Food Banks, GRACE/End Child Poverty CA

Position: Support

Status: Referred to the Assembly Committee on Appropriations (hearing 5/14).

Bill Text | Factsheet | Template LOS for Asm. Appropriations (due 5/9)

AB 1211 (Sharp-Collins) – CalFresh Benefit Maintenance

This bill would ensure that CalFresh benefits do not decrease if the federal government makes reductions to the federal SNAP program.

Sponsor(s): GRACE/End Child Poverty CA, Coalition of California Welfare Rights Organization (CCWRO), SEIU California

Position: Support

Status: Referred to the Assembly Committee on Appropriations, Suspense File

Bill Text | Factsheet | Template LOS to Appropriations Committee (due 5/9)

AB 1049 (Rodriguez) – California Food Assistance Program – Sponsor Deeming

This bill would remove sponsor deeming from the California Food Assistance Program as part of the FoodACA! campaign.

SB 761 (Ashby) – CalFresh Student Eligibility

This bill would streamline the application process for many college students applying for CalFresh.

SJR 3 (Arreguín) – SNAP Resolution

This measure would urge the United States Congress to avoid any cuts to SNAP (CalFresh) which could harm the state's children, older adults, and families, and impact the state's economic well-being.

School/Summer Meals Bills (2025):

SB 225 (McNerney) – Caregiver Meals

This bill would ensure parents and caregivers can have a meal with their child when they visit a summer meal site by requiring the State Department of Education to reimburse summer meal program operators for caregiver meals.

SB 411 (Perez) – Stop Child Hunger Act

This bill would fight child hunger by creating a single statewide SUN Bucks application website and establishing the BOOST Nutrition benefit to provide food support during school breaks and emergencies.

SB 48 (Gonzalez) – Safe Access to Schools

This bill aims to keep U.S. Immigration and Customs Enforcement (ICE) agents off California campuses by establishing a one-mile radius safe zone around schools, as well as safeguarding against the use of school data for deportation efforts.

Public Benefits Bills (2025):

AB 79 (Arambula) – Public Benefits & Higher Education County Liaisons

This bill establishes a statewide knowledge sharing network of basic needs coordinators on college campuses and county liaisons of higher education to improve awareness of public benefit programs like CalFresh and CalWORKs among college students.

AB 1161 (Harabedian) – Public Benefits during Disasters

This bill would require CDSS and DHCS to provide continuous eligibility for public benefit programs like CalFresh to a recipient who has been displaced by or impacted by a state of emergency or a health emergency.

AB 42 (Bryan) – Protect Scholarship Income

This bill ensures that grants, awards, scholarships, loans, or fellowship benefits for education are exempt from consideration as income for purposes of determining eligibility and calculating grant amounts for CalWORKs and CalFresh benefits.

SB 560 (Smallwood- Cuevas) – Decriminalize Benefit Overpayments

This bill would authorize counties to process public benefits overpayments like CalFresh through their administrative penalty system. By updating the law so overpayment cases can be handled administratively, county workers will be empowered to ensure reporting paperwork is corrected and overpayments are repaid, without traumatizing and destabilizing vulnerable families.

Anti-Hunger Bills (2025):

AB 337 (Bennett) – Edible Food Recovery Grants

This bill would expand the current list for which CalRecycle can award grants through their edible food recovery program.

SB 353 (Alvarado-Gil) – Food Donation Tax Credit

This bill would extend indefinitely the Food Donation Tax Credit, which is currently set to expire in 2027.

Anti-Poverty Bills (2025):

AB 636 (Ortega) – Expand Diaper Access Under Medi-Cal

This bill would expand access to prescription diapers for Medi-Cal recipients by dropping the qualifying age for "incontinence" from five to three.

AB 397 (Gonzalez) – Young Child Tax Credit

This bill would expand who is eligible for the Young Child Tax Credit to all CAL-EITC eligible households.

AB 398 (Ahrens) – Earned Income Tax Credit

This bill would ensure any household eligible for the Earned Income Tax Credit gets at minimum $300.

AB 661 (Lee) – Guaranteed Income Research and Expansion Act

This bill proposes a comprehensive study on the needed infrastructure, funding mechanisms, program design, and population prioritization for a permanent, statewide Guaranteed Income program to alleviate poverty and promote economic empowerment.

**This page was last updated on May 12, 2025*

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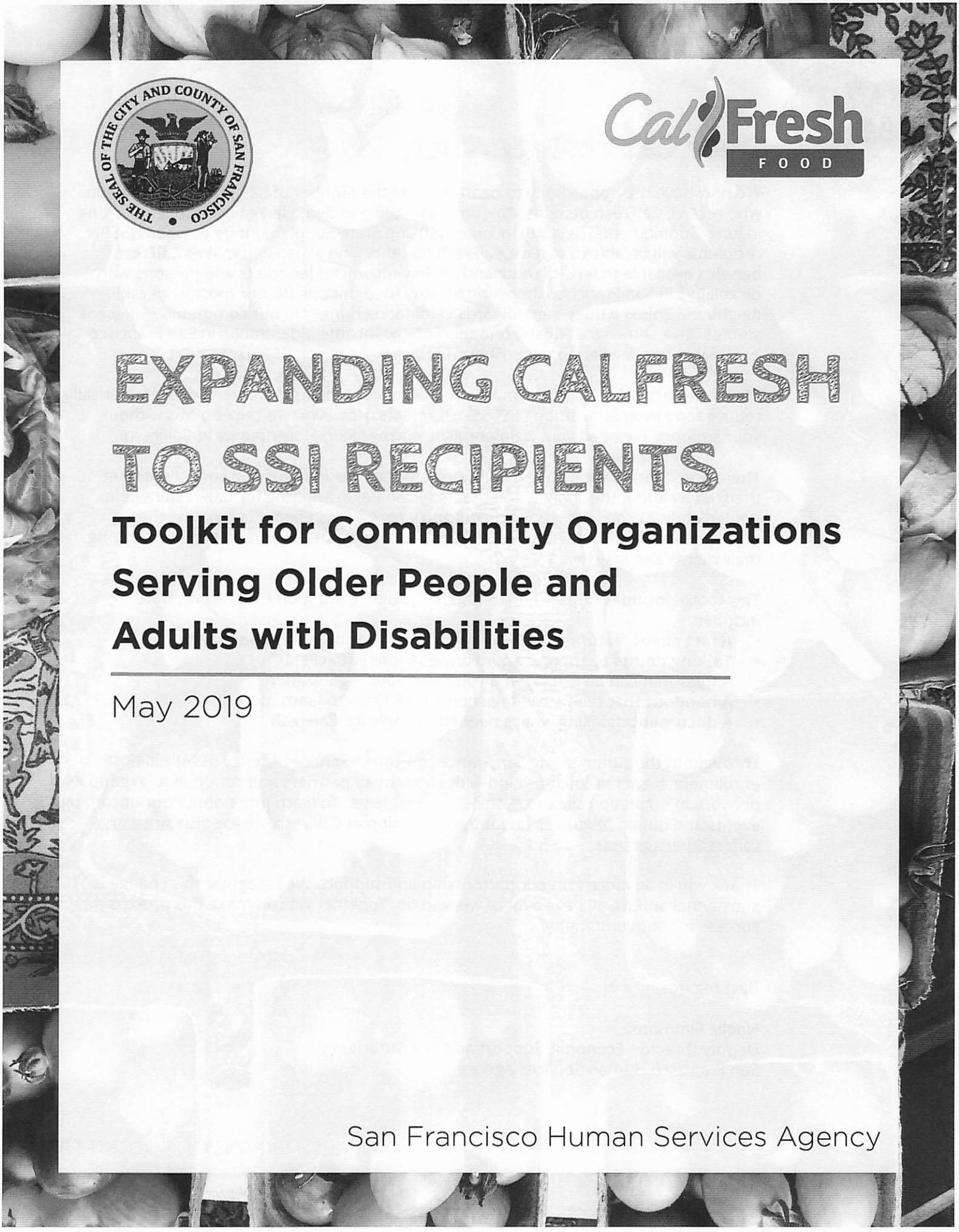

EXPANDING CALFRESH TO SSI RECIPIENTS

Toolkit for Community Organizations Serving Older People and Adults with Disabilities

May 2019

San Francisco Human Services Agency

Dear CalFresh partner,

We now have the opportunity to nearly double the number of San Francisco residents who receive CalFresh benefits, California's first line of defense against hunger. Starting in June, Supplemental Security Income (SSI) and State Supplementary Payment (SSP) recipients will be able to receive CalFresh benefits. The expansion makes CalFresh benefits available to tens of thousands of low-income older adults and persons with disabilities in San Francisco, boosting healthy food options for our most vulnerable neighbors. This is a huge step towards eliminating hunger in our communities. Recent studies have shown that nearly one-third of low-income older adults in San Francisco are unable to afford enough nutritious food.

We are experiencing a historic moment: this expansion has the potential to dramatically reduce food insecurity among SSI/SSP recipients. However, we can't do this without your support. We need your help enrolling current SSI/SSP recipients in CalFresh.

There are several ways you can help. First, spread the word among your clients. Let them know about the change and that they can begin applying for CalFresh benefits immediately. Second, help your clients apply for CalFresh benefits by using the resources in this toolkit. Third, encourage your colleagues to spread the word among their clients and caregivers.

This toolkit includes outreach material that your organization can use. We have included:

- A **fact sheet** featuring everything you need to know about the change
- **Talking points** to support your conversations with clients
- A **flyer** that can be displayed throughout your organization
- A **handout** that clients can take home with them to learn more
- A **document** detailing what's needed to apply for CalFresh

Throughout the summer, the San Francisco Human Services Agency (HSA) will host enrollment events in collaboration with community partners and continue to expand its network of outstation sites to better serve residents. To learn more about our upcoming events and obtain resources about the expansion of CalFresh, please visit sfhsa.org/calfresh-partners-ssi.

Thank you in advance for your partnership and support. We recognize this change is substantial and we all have a lot of work to do. Together we can make this process a success for our community!

Best regards,

Noelle Simmons,
Deputy Director, Economic Support and Self-Sufficiency
San Francisco Human Services Agency

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Contact Information

San Francisco Human Services Agency staff are standing by to answer questions and provide support to community organizations and service providers. For more information regarding this toolkit or application assistance for SSI recipients, please contact Ana Marie Lara, CalFresh Program Analyst, at ana.marie.lara@sfgov.org.

Digital Partner Toolkit

The materials from this toolkit are available online. Please visit sfhsa.org/calfresh-partners-ssi to access the toolkit, translations, and additional resources.

SSI/SSP + CalFresh:
WHAT YOU NEED TO KNOW

What Does the CalFresh Expansion Entail?

- In a historic move, California expanded CalFresh eligibility in 2019 to include Supplemental Security Income (SSI) and State Supplementary Payment (SSP) recipients.
- CalFresh provides monthly food benefits for low-income individuals and families. CalFresh is California's Supplemental Nutrition Assistance Program (SNAP).
- There are more than 40,000 SSI recipients in San Francisco. Of these recipients, 70% participate in the In-Home Support Services (IHSS) program.
- The expansion nearly doubles the number of individuals who are eligible for CalFresh in San Francisco and can help eliminate food insecurity among SSI/SSP recipients in our communities.
- This change **will not** affect a recipient's current SSI/SSP benefit amount.

What Do SSI/SSP Recipients Need to Know?

- SSI/SSP recipients could receive anywhere from $15–$192 each month through CalFresh. The total benefit amount is based on several factors, including household size – larger households many qualify for more benefits.
- CalFresh recipients can use their benefits to purchase food at grocery stores and neighborhood markets and hot meals from participating restaurants throughout San Francisco. Recipients can also double their money at farmers markets through the Market Match program.
- CalFresh recipients also have access to other perks such as discounts on monthly PG&E, phone and internet bills, and monthly MUNI passes.
- If a current SSI/SSP recipient lives in a household with CalFresh recipients, they do not need to take action at this time. SSI/SSP recipients will be added to this household's case during the next required report.

What Do Current CalFresh Households Need to Know?

- For current CalFresh households **without** SSI/SSP recipients, no action is needed at this time.
- For current CalFresh households **with** SSI/SSP recipients:
  - Current CalFresh recipients do not need to take action at this time. SSI/SSP recipients will be added to this household's case during the next required report.
  - If current recipients have any questions or concerns about this change, they can contact San Francisco Human Services Agency (HSA). Staff are standing by to answer questions and provide support.
  - There is a very small chance that benefits may decrease. If this happens, individuals might be eligible for additional nutrition assistance.

What Do Helpers and Community-Based Organizations Need to Know?

- Helpers and assisters can apply on behalf of someone else. The easiest way to do this is through GetCalFresh.org.
- Anyone can assist an individual in completing an application as long as the individual is present.
- An Authorized Representative may apply on someone's behalf at any time.
- HSA will offer enrollment events during the summer of 2019 at community organizations, housing, and healthcare providers.
- If you work at a community-based organization and are helping enroll individuals in CalFresh, visit GetCalFresh.org/en/for-cbos. This site can help you enroll multiple individuals quickly and securely.

Who is Eligible to Apply for CalFresh?

- Any household or individual (including homeless individuals) based in San Francisco with low or no income.
- SSI/SSP recipients starting in June 2019.
- Legal permanent residents and qualified immigrants.
- All eligibility and income requirements can be found at sfhsa.org/calfresh.

What Information/Documentation is Required to Apply?

- To apply for CalFresh, individuals will need to gather information like a photo ID, rent and utility bills, and receipts for other expenses. More information on required documentation is available at sfhsa.org/calfresh and in the "Ready to Apply" document featured in this toolkit.
- SSI/SSP recipients can claim expenses like medical expenses on their CalFresh applications.

How to Apply

The San Francisco Human Services Agency (HSA) is available to help individuals apply for CalFresh or answer any questions they might have about their benefits. There are three ways to apply or find more information:



VISIT GetCalFresh.org



CALL (415) 558-4700



COME IN

Visit one of three HSA centers in San Francisco, open Monday through Friday, 8am–5pm:

- 1235 Mission Street
- 1440 Harrison Street
- 2 Gough Street

Individuals can also visit an HSA outstation in San Francisco at:



Chinese Newcomers,
777 Stockton Street, #104

Open Monday, Tuesday, Thursday, and Friday from 9am–4pm



Wu Yee Children's Services,
888 Clay Street

Open every Friday and the 3rd and 4th Wednesday of every month from 9am–4pm

Conversation Starters

TIPS AND IDEAS FOR DISCUSSING CALFRESH WITH SSI/SSP RECIPIENTS

Exciting Changes to CalFresh

- There is a big change rolling out to Supplemental Security Income (SSI) and State Supplementary Payment (SSP) recipients this summer. Starting in June, SSI/SSP recipients will now be eligible to receive CalFresh benefits.
- Now more than one million additional Californians are eligible for CalFresh. If you're newly eligible, don't miss out on this benefit that will help you get the food you need! There are enough benefits for every eligible resident.

What to Tell SSI Recipients

- Living in San Francisco can be expensive. CalFresh is a program that can boost your budget and make it easier to buy healthy food.
- You can now apply for CalFresh benefits, which are benefits you can spend at your local grocery store, neighborhood market, or farmers markets throughout San Francisco.
- You can also use your CalFresh benefits to purchase hot meals from restaurants throughout San Francisco and double your money to buy food at farmers markets.
- It's hard to say how much you might actually receive each month, but SSI/SSP recipients could receive anywhere from $15–$192 each month. The amount you receive is based on several factors, including your household size and current income.
- Your benefits roll over month-to-month and can be saved up for large purchases or special occasions, like a holiday!
- Your SSI/SSP benefits **will not** be affected by your CalFresh benefits. In fact, you can include any current medical or other expenses, like rent and utilities, in your application. This might result in additional CalFresh benefits for you.
- Most SSI/SSP recipients will only need to reapply for CalFresh once every three years, which makes maintaining your CalFresh benefits easy.
- If you're a current SSI/SSP recipient and you live with someone who receives CalFresh, you don't need to take any action at this time. You will be added to their CalFresh household on the next required report.

What to Tell Current CalFresh Recipients

- If you don't live with any SSI/SSP recipients, your benefits **will not** change. You don't need to take any action at this time. Just keep using your CalFresh benefits to find healthy food!
- If you've already told us about the SSI/SSP recipient in your household, you don't need to take any action at this time. When it is time to reapply, the San Francisco Human Services Agency (HSA) will update your application to include the SSI/SSP recipient in your CalFresh household.

- It is likely that your CalFresh benefit amount will not change. Only a small number of families will see a decrease in their monthly CalFresh benefit amount. If that happens, you may be eligible for additional state-funded nutrition assistance programs.
- If you have any questions or concerns about this change to CalFresh, you can contact HSA.

What to Tell Helpers and Caregivers

- If you're helping someone apply for CalFresh, the easiest way to do this is through GetCalFresh.org.
- When applying on behalf of someone else, you'll want to work closely with them to make sure you're providing the requested information as accurately as possible.

How to Get Help and Apply

We know this is a big change. HSA staff are available to help individuals apply for CalFresh or answer any questions you might have about the change. There are three ways to apply or find more information:



VISIT GetCalFresh.org



CALL (415) 558-4700



COME IN

Visit one of three HSA centers in San Francisco, open Monday through Friday, 8am–5pm:

- 1235 Mission Street
- 1440 Harrison Street
- 2 Gough Street

Social Media Posts

SAMPLE MESSAGES TO PROMOTE CALFRESH TO SSI/SSP RECIPIENTS

Please feel free to modify and use the following social media content on your channels. These materials are available for download at sfhsa.org/calfresh-partners-ssi.

Please tag the San Francisco Human Services Agency so we can engage with and amplify your content. You can find us at:

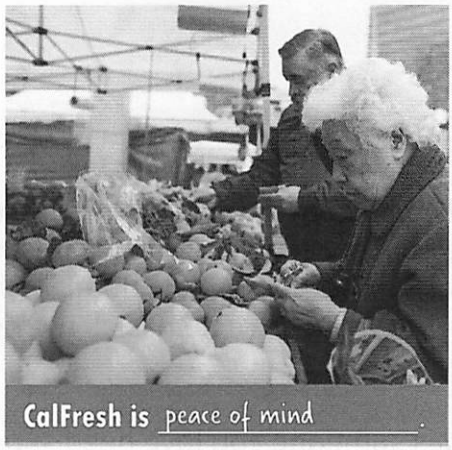
@SFHumanServices
facebook.com/SFHumanServices

@SFHumanServices
twitter.com/sfhumanservices

@SFHumanServices
instagram.com/sfhumanservices

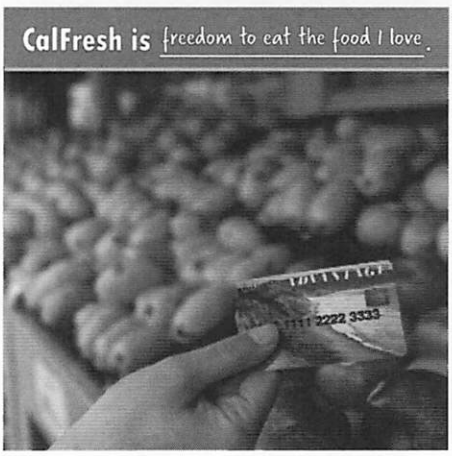
MESSAGE 1

Older adults and people with disabilities who currently receive Supplemental Security Income (SSI) are now eligible for CalFresh. You could qualify for $15-$192 each month! Apply for CalFresh online today at www.GetCalFresh.org #CalFreshFeedsSF



MESSAGE 2

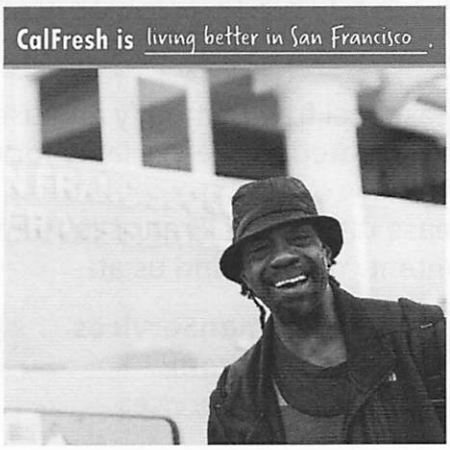
Great news from @SFHumanServices! CalFresh is expanding. If you receive SSI, you can now get extra money to buy healthy food. Over a million people in CA are newly eligible. Find out if you or a loved one qualify today: www.GetCalFresh.org #CalFreshFeedsSF



MESSAGE 3

My SSI benefits only get me so far. Now that SSI recipients can apply for CalFresh, I don't have to choose between paying my rent or eating healthy – I can have both!

Find out how CalFresh can boost your budget at www.sfhsa.org/calfresh-ssi! #CalFreshFeedsSF



MESSAGE 4

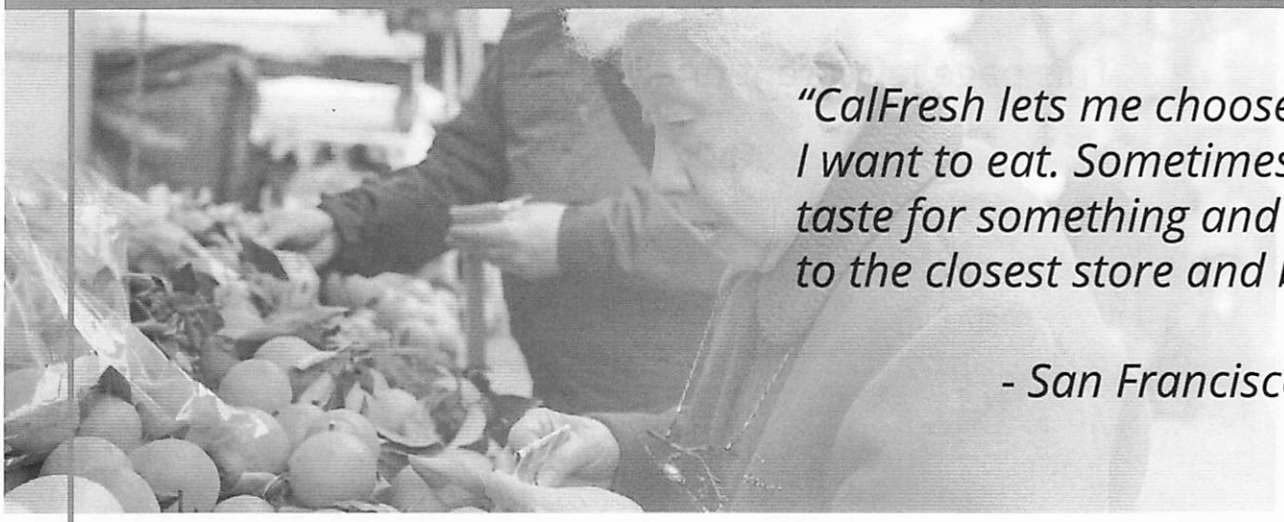
Extended Copy for Facebook or LinkedIn
Helping my son live a healthy life is my priority. Now that SSI recipients can get CalFresh, it's easier than ever to make sure he has all the healthy food he needs.

Does someone you love need support? With CalFresh, they may qualify for $15-$192 each month to buy healthy food. Get started online, by phone, or in person. www.sfhsa.org/calfresh-ssi #CalFreshFeedsSF



Buying healthy food just got a whole lot easier!

Do you get SSI/SSP?
Good news:
you can now apply for CalFresh!



"CalFresh lets me choose what I want to eat. Sometimes I get a taste for something and I can go to the closest store and buy it."

- San Francisco resident

You could receive $15–$192 each month to buy healthy food at:

- Grocery stores
- Neighborhood markets
- Farmers markets
- Participating restaurants

*Participation in CalFresh **will not** change your SSI/SSP benefits!*

Click, call, or come in to get started!

VISIT
GetCalFresh.org

CALL
(415) 558-4700

COME IN
San Francisco Human Services Agency: 1235 Mission Street, 1440 Harrison Street, or 2 Gough Street

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ATTENTION SSI/SSP RECIPIENTS:

CalFresh FOOD

You can now apply for CalFresh!

Participation in CalFresh will not change your SSI/SSP benefits!



With CalFresh, you can receive $15–$192 each month to buy your favorite healthy foods!

CalFresh is a nutrition assistance program that makes eating healthy more affordable.

Benefits can be used at grocery stores, neighborhood markets, and even farmers markets throughout San Francisco.
You can also visit select restaurants to buy hot food.

Click, call, or come in to get started!

VISIT
GetCalFresh.org

CALL
(415) 558-4700

COME IN
Visit the San Francisco Human Services Agency

What is CalFresh?

Living in San Francisco is expensive and buying healthy food isn't always easy. CalFresh is a free nutrition assistance program that helps you save money on food. CalFresh is a tool you can use to boost your budget and buy your favorite foods.

How does it work?

Recipients will receive an Electronic Benefits Transfer card (EBT card). This EBT card works like a debit card and will be loaded with money every month for you to use at grocery stores, neighborhood markets, and even farmers markets throughout San Francisco!

How much will I get?

The amount of money you receive will depend on your household size, income, and monthly expenses. You can receive between $15–$192 each month. The best part: there is more than enough to go around. Anyone who qualifies will receive benefits, which means you will never take benefits away from other people.

Why should I apply?

Starting this summer, more than one million new Californians are now eligible for CalFresh. This is a big change to the state's program, and you don't want to miss out on receiving $15–$192 each month to boost your budget.

Will my SSI/SSP benefits change?

No! Your current SSI/SSP benefits will not change if you qualify for CalFresh.

How do I apply?

The San Francisco Human Service Agency (HSA) is here to help! Visit sfhsa.org/calfresh or call (415) 558-4700 to get started, learn more information, and apply today!

Can I help someone else apply?

Absolutely! You can use GetCalFresh.org to help others apply who would benefit from CalFresh.

Anyone can assist an individual in completing an application as long as the individual is present. A designated Authorized Representative may also apply on someone's behalf at any time.

If I want to apply in person, where should I go?

Visit the location nearest to you! HSA service centers are open Monday–Friday, 8am–5pm at:



1235 Mission Street
1440 Harrison Street
2 Gough Street

You can also visit an HSA outstation in San Francisco located at:



Chinese Newcomers,
777 Stockton Street, #104

Open Monday, Tuesday, Thursday, and Friday from 9am–4pm



Wu Yee Children's Services,
888 Clay Street

Open every Friday and the 3rd and 4th Wednesday of every month from 9am–4pm

READY TO APPLY?

How to Prepare your Income and Expense Documents

When applying for CalFresh, there are documents you may need to provide to finalize your application. We also recommend collecting as many receipts as possible: the more expenses you share with us, the higher your CalFresh benefit could be.

The information below includes the term "household." Your household is anyone who lives at the same address and purchases and prepares meals together.

CalFresh Eligibility Criteria

- Any household or individual (including homeless) based in San Francisco with low or no income
- Social Security Income (SSI) recipients starting in June 2019
- U.S. citizens and legal permanent residents
- Applicants must meet CalFresh income limits (available at sfhsa.org/calfresh).

Examples of Verification Documents You May Need

Proof of Income:

- Paystubs
- Social Security
- Veterans benefits
- Child or spousal support
- Unemployment
- Disability
- Any other source(s) of money

Proof of Expenses:

- Rent
- Mortgage statement
- Property tax
- Home insurance
- Utilities
- Medical
- Child care
- Dependent care
- Court-ordered child support

Other Verification Documents:

- Some form of verifiable identification, such as a California driver's license, birth certificate, etc.
- College class schedule and financial aid
- Employer termination letter with final pay stub
- Legal permanent resident card

If you need more information or are having trouble collecting proof, the San Francisco Human Services Agency (HSA) may be able to help. Call (415) 558-4700.

County Public Benefits Phone Systems in California

Creating a More Dignified CalFresh Experience

Prepared by J Anderson
May 2024

University of California, Berkeley
Goldman School of Public Policy

Prepared for the California Association of Food Banks

The author conducted this study as part of the program of professional education at the Goldman School of Public Policy, University of California at Berkeley. This paper is submitted in partial fulfillment of the course requirements for the Master of Public Policy degree. The judgments and conclusions are solely those of the author, and are not necessarily endorsed by the Goldman School of Public Policy, by the University of California or by any other agency.

Acknowledgments

Many thanks to Gabriela Davidson and Jenn Tracy from the California Association of Food Banks (CAFB) for allowing me to join them in advocating for the millions of Californians who rely on CalFresh to put food on their tables every year.

Thank you to the following advocates and organizations for sharing their insights, years of experience, and time:

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Anae Evangelista, San Diego Hunger Coalition
Alicia Ferrer, Central California Food Bank
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Heaven Huerta, Feeding America Inland Empire
Marcela Marquez, Maternal and Child Health Access
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Wendy Ortega, Community Service Unlimited
Karla Samayoa, 211 San Diego
Liliana Sandoval, San Francisco Marin Food Bank
Paulina Soria, Feeding America Inland Empire

Thanks to Valerie and the many CalFresh clients who shared their stories.

Finally, thank you to Erika Weissinger, whose ability to center kindness and humanity in public policy practice is an inspiration.

About California Association of Food Banks

The California Association of Food Banks (CAFB) consists of 41 member organizations stretching across the state with a mission to end hunger in California. The CAFB CalFresh Outreach team assists over 50 outreach partners across the state. The CAFB advocacy team provides federal and statewide leadership to drive legislative and administrative changes that improve food security for California's low-income communities. CAFB also leads the advocacy on public benefits technology development by hosting the CalSAWS Advocates group, which comprises more than 80 nonprofit organizations that provide direct services to clients accessing public benefits.

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Glossary of Acronyms

APT	Application Processing Timeliness
AWS	Amazon Web Services
CAPER	Case and Procedural Error Rate
CAPI	Cash Assistance Program for Immigrants
CBO	Community-Based Organization
CDSS	California Department of Social Services
CER	CalSAWS Enhancement Request
CMS	Centers for Medicaid and Medicare Services
CRM	Customer Relationship Management
CSAT	Customer Satisfaction Score
CSC	Customer Service Center
DHCS	California Department of Health Care Services
EBT	Electronic Benefit Transfer
EW	Eligibility Worker
FCR	First Call Resolution
FNS	Food and Nutrition Service
GA/GR	General Assistance/General Relief
ICMI	International Customer Management Institute
IVR	Interactive Voice Response
JPA	Joint Powers Authority
LRS	Los Angeles Eligibility, Automated Determination, Evaluation, and Reporting System
NPS	Net Promoter Score
PER	Payment Error Rate
PIN	Personal Identification Number
RCA	Refugee Cash Assistance
SAWS	Statewide Automated Welfare System
SNAP	Supplemental Nutrition Assistance Program
TCVAP	Trafficking and Crime Victims Assistance Program
USDA	United States Department of Agriculture

Executive Summary

This report provides an in-depth evaluation of California county public benefits phone systems, focusing on the CalFresh program. Authored by J Anderson from the Goldman School of Public Policy at the University of California, Berkeley, and commissioned by the California Association of Food Banks, the study explores the systemic challenges within phone systems that hinder equitable access to public benefits. The analysis is guided by the fundamental belief that access to food is a human right and that ensuring this access must be handled with the utmost dignity.

Key Findings

- **Inconsistent System Deployments**: There is considerable variability in how counties implement the Amazon Connect technology, leading to disparities in service quality and impacting overall system effectiveness and user experience.
- **Barriers to Access**: Critical issues such as long wait times and dropped calls have various causes and disproportionately affect low-income individuals who can least afford delays in accessing public benefits.
- **Performance and Customer Experience Measurement:** Data collection can provide insights to guide strategic improvements, foster accountability, and ensure optimal resource utilization. Both performance and customer experience metrics should be used.

State-Level Recommendations (CDSS and DHCS)

1. Measure Both CSC Performance and Customer Experience
2. Require Public Reporting of CSC Performance and Customer Experience Data
3. Develop a CSC Performance Evaluation Formula

County-Level Recommendations

4. Increase CBO Access to EWs and Enrollment Information
5. Enable Amazon Connect Callback Features
6. Utilize CalSAWS Email And Text Notification Capabilities
7. Implement "Place-in-Line" Updates
8. Adopt the BenefitsCal Scheduling Request Tool

[redacted]

9. Identify County Social Service Agency Calls on Caller ID
10. Ensure Eligibility Workers Are Trained on All Self-Employment Income Verification Protocols

CalSAWS & County Recommendations

11. Identify Frequently Ended Call Nodes
12. Disaggregate Dropped Calls, Abandoned Calls, And Maximum Capacity Releases
13. Audit Printing and Mailing Operations Regularly and Require Postmarks

There is a critical need for strategic improvements at both the technological and operational levels to fulfill the right to food and end hunger in California. By implementing these recommendations, counties statewide can dramatically improve the quality of service provided to CalFresh customers, moving towards a more inclusive, efficient, and responsive public benefits system that upholds the dignity of every individual it serves.

Statement on Food Access

Basic human dignity demands that each of us have access to nourishing food. To that end, all Californians must be able to feed themselves and their loved ones, free from the haunting specters of hunger and food insecurity. Freedom from hunger is not only about meeting basic needs; it is about fostering a sense of dignity and empowerment that enables individuals, families, and communities to thrive. When we ensure everyone has access to food, we build a stronger society where people are freer to pursue their dreams and contribute to our shared prosperity.

Methodology

Employing a qualitative research approach, I sought to understand the nuanced interactions of individuals with county public assistance phone systems. My primary data collection method was semi-structured interviews, which I selected to allow for an in-depth exploration of participant views and experiences, facilitating rich, narrative data that is highly contextual.

Participant Selection

Purposive sampling ensured the representation of diverse demographics and geographic locations across California counties with the largest public assistance populations. The sample included employees from Community-Based Organizations (CBOs) who assist clients in accessing public benefits programs, CalFresh customers, and CalSAWS Project staff, capturing a broad spectrum of insights from governmental, advocacy, and customer viewpoints.

Data Collection

I utilized semi-structured interviews to gather detailed qualitative data, relying on interview guides I developed based on an extensive review of relevant literature and preliminary insights from initial exploratory interviews. This preparation ensured that the interviews remained focused on the research objectives while allowing flexibility for participants to introduce and elaborate on topics they deemed significant. All interviews were conducted virtually and were audio-recorded with participants' consent to ensure accuracy in data capture and analysis.

Data Analysis

Thematic analysis allowed me to identify recurring patterns, themes, and insights across the data set. This analysis was instrumental in understanding the complexities of user experiences and the effectiveness of the phone systems from multiple stakeholder perspectives.

Ethical Considerations

I adhered to strict ethical guidelines, which included obtaining informed consent from all participants, ensuring the confidentiality and anonymity of their responses, and protecting their rights throughout the research process.

Limitations

Although providing rich and detailed insights, I recognize that my reliance on qualitative data limits the generalizability of the findings. Still, these insights are invaluable for pinpointing targeted interventions and enhancing system-wide practices. Additionally, I acknowledge that several communities' perspectives are absent from this sample, including non-English speakers, disabled individuals, and undocumented Californians. While many issues this report addresses affect these communities, their specific needs require further deliberate and sensitive investigation.

Introduction

Every year, millions of Californians qualify for food assistance through CalFresh, the state's implementation of the federally funded Supplemental Nutrition Assistance Program (SNAP), formerly known as food stamps. Despite California's reputation for progressive values and dedication to social safety net programs, the state consistently ranks among those with the lowest SNAP participation rates nationwide.

According to a 2020 United States Department of Agriculture Food and Nutrition Service report on estimated SNAP participation, **California ranked fifth lowest in the nation, with only 66% of eligible Californians enrolled in the program, well below the national average of 78%.**[1] Although approximately 4.4 million individuals received CalFresh benefits in 2020, over a million more may have been eligible but unenrolled. While organizations statewide work tirelessly conducting CalFresh outreach and connecting individuals and families to benefits, numerous systemic challenges undermine their effectiveness.

In 2024, a report from Nourish California estimated that around **2.7 million Californians qualify for CalFresh but are not enrolled.** The report further highlights the significant increase in federal funding the state would receive if CalFresh participation rates were comparable to those of states with higher participation. **Every year, California is leaving billions of dollars on the table.**[2]

Fig. 1: Service and funding impacts under varying participation rates

If California matched the participation rate of...	The number of additional participants reached would be...	The additional Federal Dollars California would receive through CalFresh would be... (b)	The Economic Activity resulting from additional Federal Benefits would be...
Oregon (100%)	2.66 million people	$3.46 billion	$5.33 billion
New York (82%) (a)	1.25 million people	$1.63 billion	$2.51 billion
National Average (77%)	860,000 people	$1.12 billion	$1.72 billion

Source: Nourish California

[1] United States Department of Agriculture. "Reaching Those in Need: Estimates of State Supplemental Nutrition Assistance Program Participation Rates in 2020." September 2015. Accessed April 19, 2024. https://www.mathematica.org/publications/2019-reaching-those-in-need- estimates- of-state-supplemental-nutrition-assistance-program.

[2] Nourish California. "Lost Dollars, Empty Plates: The Impact of CalFresh Participation on State and Local Economies - 2019 Report." *Nourish California*. 2019. Accessed May 1, 2024. https://nourishca.org/CalFresh/CFPAPublications/LDEP-FullReport-2019.pdf.

As one of the highest net contributors to the federal budget, California has a strategic and moral imperative to ensure that every dollar allocated for social services reaches those in need.[3] By enhancing the efficiency and accessibility of the CalFresh program, California can uphold its commitment to supporting its most vulnerable residents and ensure a more equitable return on its substantial fiscal contributions to the federal treasury. Leveraging available federal funds through improved public benefits systems is crucial, not only to alleviate hunger but to strengthen community resilience and economic stability statewide.

In a collaborative effort to enhance service delivery and streamline eligibility assessment for public benefits programs, California counties have partnered with Accenture, a global professional services company specializing in strategy, consulting, digital, technology, and operations. Together, they have consolidated three regional public benefits eligibility systems into one statewide automated welfare system called CalSAWS. Management of this system falls under the jurisdiction of counties through a Joint Powers Authority structure, referred to as the CalSAWS Consortium or simply "the CalSAWS Project."

Deloitte, a multinational professional services network providing audit, tax, consulting, and advisory services, was contracted to build the public-facing benefits application website, BenefitsCal. Amazon Web Services (AWS) was also enlisted to provide counties with an optional integrated customer service center (CSC) solution using Amazon Connect.

All 58 counties now use CalSAWS to administer public benefits programs. However, there is broad and currently undocumented variation in how they have adopted and deployed the system, as counties possess significant autonomy in implementing optional features and developing and deploying the Amazon Connect technology. Recognizing the interplay between CalSAWS Project technologies, county social services business operations, and the configuration of each phone system is vital for identifying methods to increase positive outcomes and enhance customer experiences.

The successful migration of all 58 counties to the unified CalSAWS system at the end of 2023 represents a significant achievement for the CalSAWS Project.

[3] Internal Revenue Service. "SOI Tax Stats - Gross Collections, by Type of Tax and State - IRS Data Book Table 5." 2023. Accessed May 5, 2024. https://www.irs.gov/statistics/soi-tax- stats-gross-collections-by-type-of-tax-and-state-irs-data-book-table-5

However, as with any large and complex system, challenges persist, as evidenced by a security breach in February 2024.[4] These challenges highlight the need for ongoing evaluation to improve services continuously. As the project transitions into the "maintenance and operations" phase post-migration, advocacy organizations are presented with an opportunity to contribute to refining the design of critical access points.

In light of numerous comments from CBOs, advocates, and customers received by the California Association of Food Banks concerning limitations and barriers within the new Amazon Connect CSC systems, advocacy efforts are needed to ensure prompt and equitable access to benefits via phone.

However, too little is known about the newly implemented Amazon Connect CSC technology – its capabilities, limitations, and interconnectedness to the broader system of public benefits administration – for organizations to advocate for a more dignified CalFresh experience effectively.

This report commissioned by the California Association of Food Banks aims to:

1. Provide a brief history of California public benefits eligibility systems;
2. Offer an understanding of how counties have deployed Amazon Connect technology;
3. Identify barriers experienced by CBOs and public benefits program customers as they manage CalFresh claims; and
4. Recommend alternatives that center positive customer experience.

A Brief History of Public Benefits Administration in California

Consolidating Public Benefits Eligibility Systems

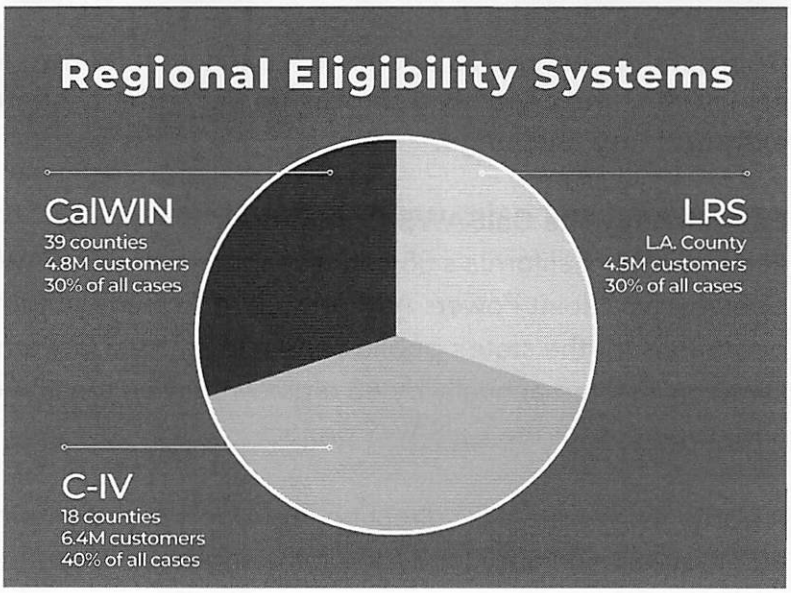
California's welfare system has historically relied on disparate systems to administer public benefit programs like CalWORKs, CalFresh, and Medi-Cal.

[4] Sheeler, Andrew. "Hackers Used Stolen Passwords to Access Thousands of BenefitsCal Accounts." Sacramento Bee. April 11, 2024. Accessed April 30, 2024. https://www.sacbee.com/news/politics-government/capitol-alert/article287590600.html.

By 2019, counties had consolidated program administration into three regional computer systems.[5]

Running multiple systems posed many challenges. Difficulties with data integration, interoperability, and coordination between agencies often led to inefficiencies, administrative burdens, and errors in eligibility determination and benefit distribution.

Fig. 2: CA Eligibility systems as of 2019



To address growing inefficiency in the administration of its public benefits programs, the federal government required California to transition to a single statewide automated welfare system (SAWS). To ensure timely action, the Centers for Medicare and Medicaid Services (CMS) and the Food and Nutrition Service (FNS) made California's continued receipt of Federal Financial Participation in State Assistance Expenditures – funding provided to the state by the federal government for specific jointly funded programs – contingent upon its compliance.

A single SAWS aims to bring greater consistency and uniformity in service delivery statewide and improve compliance with federal regulations. It also seeks to more strongly support vulnerable populations and optimize the use of taxpayer funds by increasing the likelihood that eligible individuals and families will receive benefits and services promptly and accurately.

Insight

California is one of only ten states administering its public benefits programs at the county level. Other states with a decentralized approach to administration include Colorado, Minnesota, New Jersey, New York, North Carolina, North Dakota, Ohio, Virginia, and Wisconsin.

[5] "History of Statewide Automated Welfare." *CalSAWS*. Accessed February 20, 2024. https://www.calsaws.org/about-us/history/.

With 58 counties, California has more public agencies administering public benefit programs than the 40 states with centralized administration combined. Many argue that county administration allows for bespoke approaches to program management tailored to local needs.

Coordinating across 58 agencies – each with its own leadership, organizational structures, and capacity – to provide exceptional customer service is an extraordinary challenge.

Establishing The CalSAWS Consortium

In June 2019, California's 58 counties formed the CalSAWS Consortium, which operates as a Joint Powers Authority (JPA) to manage technology projects and operations for the state's public benefit programs. Governed by a 12-member Board of Directors elected annually by 60 representatives, the JPA oversees budgets, contracts, and resources for the CalSAWS project.

It also provides strategic direction in support of the automation of public benefits administration, in addition to the following:

1. **System Implementation:** Overseeing the statewide implementation of the CalSAWS system, including selecting vendors, developing requirements, customizing the system to meet the needs of California's diverse counties, and ensuring a smooth transition from legacy systems.

2. **Project Management:** Managing all aspects of the CalSAWS project – including budgeting, scheduling, and resource allocation – and coordinating with state and county agencies, vendors, and stakeholders to ensure they meet project milestones on time and within budget.

3. **Training and Support**: Providing training and support to county agencies and staff to ensure they can use the CalSAWS system effectively, including developing training materials, conducting training sessions, and providing ongoing technical assistance and support.

4. **Data Integration and Migration:** Facilitating data integration from legacy systems into CalSAWS involving the mapping of data fields and migrating historical data to the new system to ensure continuity of service for existing clients.

5. **Governance and Oversight**: Establishing governance structures and processes to oversee the ongoing operation and maintenance of the CalSAWS system, including defining roles and responsibilities, establishing performance metrics and standards, and conducting regular reviews and audits to ensure compliance with regulations and best practices.

Insight
The CalSAWS Board of Directors, which includes 11 high-ranking county social services officials and one state social services official, must approve any changes to each county's technology systems. From my interactions with CalSAWS staff through Zoom and email, it is evident that there is a distinct separation between technology implementation and business operations within the organization. For instance, the staff categorizes the design of a call flow as a technological aspect, whereas the staffing of phone lines falls under business operations.

The CalSAWS Project views itself primarily as a technology facilitator rather than an operational overseer or enforcer. This approach could explain why CalSAWS staff may seem hesitant to intervene more assertively on behalf of advocates and customers, indicating a potentially limited influence in operational matters beyond their defined technological scope. However, as technology experts, CalSAWS staff have opportunities to share their unique insights with counties to support how counties implement and maximize technology in support of customer access.

Moving to the Cloud
As of October 2023, all counties have transitioned to CalSAWS. Described as a "statewide case management system in a cloud computing ecosystem," CalSAWS is a more agile infrastructure model than traditional on-premise data centers. In consultation with Accenture, the CalSAWS Project selected Amazon Web Services (AWS) as the system's cloud host. Los Angeles and its LRS system – the foundation code for CalSAWS – was the first county to migrate to the AWS cloud in 2019 before the COVID-19 pandemic.

The migration enabled Los Angeles County Department of Public Social Services employees to work from home during the pandemic. AWS cloud-based access to the CalSAWS system allowed casework to continue remotely and with minimal interruption. Although not without its challenges, the move to cloud computing has quickly proved

a promising upgrade in technological infrastructure and improved service provision for everyday Californians.[6]

AWS and the CalSAWS Project also provide counties with cloud-based CSC technology through Amazon Connect. The platform enables organizations to establish and oversee CSCs in the cloud. Amazon Connect promotes itself as reducing costs and improving contact center metrics.

A promotional case study on the Amazon Connect website advertises a successful 60% call volume reduction in Johns Creek, Georgia. Before using Amazon Connect, the city operated an after-hours phone system that allowed callers to leave voicemails, which operators responded to the following business day. This system could not deliver information fast enough and often took operators away from answering phones during business hours. By designing an after-hours automated call center, the city connected callers with information more quickly while reducing the number of voicemails requiring responses. For the specific needs of Johns Creek, Amazon Connect appeared to be a helpful solution.[7]

Amazon Connect's ability to reduce the volume of calls requiring human assistance is particular to the customer needs being handled by the call center. In the case of Johns Creek, the need for general information was driving phone traffic, making an automated system a viable solution. Unlike the Johns Creek system, delivering general information is only one function of a county public benefits phone system. County phone systems must also be able to provide detailed, personal information to individuals with speed and reliability.

Insight
To understand how capable Amazon Connect is at reducing call volume, it is critical first to understand why customers call in. The more significant the number of calls seeking case-specific assistance, the less likely simple call center automation will substantially reduce call volume. This is not to suggest that Amazon Connect is not valuable or an improvement upon previous technology, but rather that call volume reduction alone may not be a consequential or relevant evaluation metric.

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[6] Amazon Web Services. "From an Election to a Pandemic." Accessed April 15, 2024. https://www.govexec.com/media/aws_la_county_cloud_8.18.pdf.
[7] Amazon Web Servicees. "City of Johns Creek Automates 24/7 Contact Center with Amazon Connect." 2020. Accessed April 15, 2024. https://aws.amazon.com/solutions/case-studies/city-of-johns-creek-case-study/?did=cr_card&trk=

To harness the full power of technology to improve public benefit experiences, county administrators must correctly identify customer needs, pair them with capable technology, and measure success by how well the technology meets those needs.

A New Way of Doing Public Business

A Better Experience

In today's digital era, Californians have come to expect service at the speed of fiber optic cable. Amazon's vast network of regional fulfillment centers has revolutionized delivery times from days to hours, setting a precedent for expeditious service. Similarly, platforms like Doordash, GrubHub, and Instacart streamline food delivery to doorsteps with minimal human interaction. Social media giants such as X, Facebook, and Instagram facilitate direct interactions between customers and brands, fostering seamless communication faster than ever before. With just a click, products are ordered, and issues are resolved.

While many have come to associate technology with loneliness, social isolation, and turbo-charged consumerism, there remain untapped opportunities to use technology for social good, such as creating community, connecting people to vital services, and generally improving lives.

Communities have witnessed the efficiency of private sector operations and now expect the same from their government. However, the pace of innovation in the public sector has lagged due to its bureaucratic processes, risk aversion, resource limitations, and lack of a coordinating profit motive. Despite these challenges, rising levels of homelessness, hunger, and poverty require faster, more responsive public services than ever before.

Presidential executive orders to enhance the customer experience of federal systems have become increasingly common in recent years. Executive Order 14058 on *Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government*[8] and Executive Order 13571 on *Streamlining Service Delivery and Improving Customer Service*[9] have sought to push the government into the digital era.

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[8] Biden, Joseph R. "Transforming Federal Customer Experience and Service Delivery To Rebuild Trust in Government." Executive Order no. 14058, December 13, 2021. https://www.federalregister.gov/documents/2021/12/16/2021-27380/transforming-federal-customer-experience-and-service-delivery-to-rebuild-trust-in-government. Accessed April 17, 2024.

[9] Obama, Barack. "Streamlining Service Delivery and Improving Customer Service." Executive Order no. 13571, April 27, 2011. https://www.federalregister.gov/documents/2011/05/02/2011-10732/streamlining-service-delivery-and-improving-customer-service. Accessed April 17, 2024.

Both executive orders have called for digitizing government services to make them more convenient and accessible to the public. This involves modernizing outdated systems and processes, implementing user-friendly interfaces, and providing online self-service options for common tasks such as applying for benefits, accessing government information, or filing paperwork. By leveraging technology and digital platforms, federal agencies can reduce bureaucratic red tape, eliminate paperwork, and deliver services more efficiently.

These executive orders also emphasize the importance of customer feedback and data-driven decision-making in improving the quality of government services. Agencies are encouraged to solicit input from customers through surveys, focus groups, and online feedback forms to better understand their needs and preferences. They could then use this input to identify areas for improvement, prioritize initiatives, and measure the impact of service enhancements.

By adopting a customer-centered approach to service delivery, agencies can better meet customers' needs, improve their overall satisfaction, and deliver positive experiences to individuals and families needing vital aid. The customer service center is one way government agencies are heading in this direction.

What is a Customer Service Center?

A customer service center (CSC) is a centralized facility or department within an organization that handles customer inquiries, concerns, and requests for assistance. It serves as a primary point of contact for customers seeking help or information. CSCs typically utilize various communication channels such as phone, email, chat, and social media to interact with customers and address their needs promptly and effectively. They often incorporate advanced software, interactive voice response (IVR) systems, and customer relationship management (CRM) tools to improve efficiency, personalize interactions, and track customer interactions across multiple channels.

In contrast, a standard phone system typically refers to the basic telecommunications infrastructure used by an organization for making and receiving phone calls. While it may include basic features like call forwarding and voicemail, it is not specifically tailored for customer service purposes. Standard phone systems may be unable to effectively manage high call volumes, route calls to appropriate agents, or track customer interactions.



Insight
Although every California county can access Amazon Connect technology, not all counties offer a CSC experience. A less expansive phone system may be adequate for counties with small benefits populations to meet customer needs. **Matching community needs to system capabilities is critical in providing an exemplary phone experience regardless of infrastructure.**

Government Customer Service Centers on the Rise

Accelerated by the COVID-19 pandemic, chief information officers nationwide have begun seeking ways to offer seamless customer service and a flexible work environment. State and county governments are increasingly adopting CSC technology to streamline the administration of public benefits programs. Traditionally, these programs have relied on manual processes and in-person interactions, leading to inefficiencies and long wait times for customers. By integrating modern CSC technology, governments can modernize operations and improve service delivery to people in need.

Key benefits of successfully implemented CSC technology include the following:

- Improved accessibility
- Heightened responsiveness
- Reduced wait times
- Minimized customer frustration
- Maximized customer agency (self-service options)
- Increased bandwidth for complex cases

CSC technology also enables governments to collect and analyze data more effectively, providing insights into customer needs and preferences. This data-driven approach allows governments to tailor their services to meet their customers' needs better and identify areas for improvement.

Overall, state and county government adoption of CSC technology represents a significant step toward modernizing public benefits delivery. By leveraging technology to improve accessibility, responsiveness, and efficiency, governments can better serve their customers and ensure that public benefits reach those most in need. Presently, 30 California county social service agencies operate CSCs.[10]

[10] CalSAWS. "CalSAWS IVR/Contact Center." 2024.

California Counties Answer the Phone

Standard Self-Service IVR

The CalSAWS Project has given all 58 California counties access to Amazon Connect CSC technology. However, not all counties utilize the technology, and not all counties that utilize it use it in the same way. The most commonly used Amazon Connect feature is IVR. Standard IVR for basic self-service assistance allows customers to access basic account and operational information without requiring the attention of an eligibility worker (EW).

The CalSAWS Project standard self-service IVR system gives customers the ability to:

1. **Obtain Information in 15 Languages:** Customers can navigate the IVR in Arabic, Armenian, Cambodian, Cantonese, English, Farsi, Hmong, Korean, Lao, Mandarin, Portuguese, Russian, Spanish, Tagalog, and Vietnamese.

   In March 2008, the California Department of Social Services issued All-County Letter No. 08-16, which outlines county obligations to provide translated public benefits forms in multiple languages. Languages named in the letter but not represented in the IVR system are Cushite, Formosan, Japanese, Mien, Punjabi, Syriac, and Ukranian. The letter also acknowledges that there will be no funding provided to update IVR systems, citing the relatively low number of customers who request forms in these languages.[11]

2. **Get Program Status Updates:** Customers can receive updates on the status of their enrollment in public benefits programs, including CalFresh, CalWORKs, and Medi-Cal.

   Program status updates are not available for General Assistance/General Relief (GA/GR), Trafficking and Crime Victims Assistance Program (TCVAP), Refugee Cash Assistance (RCA), and Cash Assistance Program for Immigrants (CAPI).

[11] Metsker, Charr Lee, and Tom Lee. All-County Letter No. 08-16. California Department of Social Services, March 25, 2008. https://www.cdss.ca.gov/lettersnotices/entres/getinfo/acl08/08-16.pdf. Accessed May 1, 2024

3. **Verify Benefit Amount Issued:** Customers can view benefit payments for the current and following month.

4. **Confirm Withheld Benefits:** Customers can confirm whether or not their benefits have been withheld. The Held status is only set when a worker manually updates an issuance and selects it meaning that the customer has not received the benefit because the county is withholding the payment.[12] [13]

5. **Track Document Status:** Customers can confirm the status of their CalWORKs and CalFresh Semi-Annual Reports (SAR7) and CalWORKs, CalFresh, and Medi-Cal redetermination packets.

6. **Request New IVR Personal Identification Number (PIN):** Customers receive a PIN to confirm their identity and access their CalSAWS case file when they call. If they forget or misplace their PIN, they can request a replacement through the IVR system. It is important to note that this PIN differs from the one used to access benefits via an EBT card.

7. **Request Forms**

8. **Request Local Office Information**

Differences in County Phone Systems

To understand the different structures of county phone systems, I collected information by reviewing CalSAWS documents, visiting county social service agency websites, and contacting local offices.

I found that 28 counties do not operate CSCs. Instead, they utilize varying combinations of pre-existing phone systems, non-Amazon Connect IVR technology, and CalSAWS self-service IVR to serve their customers.

Another 30 counties utilize the CalSAWS self-service IVR system with customized CSC call flows. These customized flows, designed to meet the specific operational needs of each county's social services agency, are implemented with support from CalSAWS

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[12] Muralidara, Dheeraj. "CalSAWS Design Document: CA 226837." CalSAWS, March 18, 2021. https://www.calsaws.org/wp-content/uploads/2021/07/CA-226837-Inbound-IVR.pdf. Accessed April 11, 2024.

[13] Frequent reasons payments are withheld include eligibility issues, incomplete or incorrect information, failure to comply with program requirements, administrative errors, recertification delays, and CalSAWS technical issues.

[redacted]

Project technical staff. Any proposed system changes must be formally submitted to the CalSAWS Change Control Board for approval.

The CalSAWS Project does not have the authority to enforce the implementation of its phone technologies. The only technology counties are mandated to adopt is the CalSAWS eligibility system. Currently, there is no publicly available record tracking which phone systems counties use.

The following is a thematic summary of additional findings that emerged from my analysis of public benefit phone systems in different California counties.

1. **Variety of Systems**: Counties use a range of public benefit phone systems, from simple existing phone systems to complex integrated IVR systems. Each is tailored to the specific needs and population size of the county.
2. **Adoption of Technology**: Some counties, like Los Angeles, utilize advanced IVR technologies that offer self-service and person-to-person assistance, whereas others, like Alpine, operate with basic, direct-call systems. Riverside County uses a hybrid model incorporating self-service options and personalized assistance based on zip code verification.
3. **Accessibility and Language Options**: There is a significant variance in the availability and language options across the systems. While some counties offer services in up to 15 languages and operate 24/7, others provide more limited language support and operating hours.
4. **Integration and Independence**: The degree of integration with CalSAWS technologies varies. Some counties independently manage their systems outside the CalSAWS offerings, reflecting different levels of technological integration and autonomy in public service delivery.
5. **Population Size and System Complexity**: There appears to be a correlation between a county's population size and the complexity of its phone system. Larger counties like Los Angeles have more sophisticated systems that can handle a greater variety of queries and offer more extensive hours of operation. Additionally, counties with larger populations may have correspondingly larger budgets that allow them to invest in more advanced technology and staffing.

6. **Compliance and Mandate**: Despite the varying degrees of technology adoption, all counties have a uniform mandate to adopt the CalSAWS eligibility system, contrasting with the optional use of phone technologies.

These themes highlight the diverse approaches to implementing technology in public benefits phone systems, emphasizing customization to local needs and technological capabilities.

County Phone System Profiles

The following profiles more specifically illustrate how public benefit phone systems vary across California.

Amador County: Existing Phone System & Separate IVR Self-Service

Location: Northeast of Stockton between Sacramento and the California/Nevada border

2023 Population: 41,811 people[14]

2023 CalFresh Population: 4,225 people or 10% of total population[15]

☐ **CSC** ☒ **Self-Service IVR** ☒ **Multiple Languages**

IVR Number: (877) 410-8802
Hours of Operation: 24/7
Language(s): 15 languages

Phone Number: (209) 223-6550
Hours of Operation: M-F from 8 AM-5 PM
Language(s): English only

Amador County has adopted the Amazon Connect IVR self-service hotline designed by the CalSAWS Consortium while maintaining a separate phone system. Residents may call the self-service IVR system for automated case-specific updates and general program information or call the existing phone system for direct person-to-person assistance. The two systems are separate and do not interact with each other.

[14] U.S. Census Bureau. "Amador County, California: QuickFacts." Accessed April 20, 2024. https://www.census.gov/quickfacts/fact/table/amadorcountycalifornia/PST045223#PST045223.

[15] California Department of Social Services. "CalFresh Data Dashboard." Accessed April 20, 2024. https://www.cdss.ca.gov/inforesources/data-portal/research-and-data/calfresh-data-dashboard.

Riverside County: Existing IVR Only (Self-Service & Person-to-Person)
Location: From the eastern edge of L.A. County to the Arizona border
2023 Population: 2,492,442 people[16]
2023 CalFresh Population: 321,332 people or 12.9% of total population[17]

☐ **CSC** ☒ **Self-Service IVR** ☒ **Multiple Languages**

Existing IVR Number: (877) 410-8827
Hours of Operation: M-F from 8 AM-5 PM (person-to-person, 24/7 (self-service)
Language(s): 15 languages

Riverside County operates its own IVR system with self-service options outside CalSAWS basic or custom models. The system transfers callers to their assigned service center through zip code verification for person-to-person assistance.

Alpine County: Existing Phone System Only
Location: Running along the California/Nevada border south of Lake Tahoe
2023 Population: 1,141 people[18]
2023 CalFresh Population: 167 people or 14.6% of total population[19]

☐ **CSC** ☐ **Self-Service IVR** ☐ **Multiple Languages**

Existing Phone System Number: (530) 694-2235
Hours of Operation: Weekdays from 8 AM - 5 PM
Language(s): English only

Alpine County is California's least populous county. The county's public assistance communications infrastructure is probably minimal because of its sparse population. The phone line offers no IVR self-service options and either connects directly to an operator or forwards to a phone tree/staff directory.

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[16] U.S. Census Bureau. "Riverside County, California: QuickFacts." Accessed April 20, 2024. https://www.census.gov/quickfacts/fact/table/riversidecountycalifornia/PST045223.
[17] California Department of Social Services. "CalFresh Data Dashboard." Accessed April 20, 2024. https://www.cdss.ca.gov/inforesources/data-portal/research-and-data/calfresh-data-dashboard.
[18] U.S. Census Bureau. "Alpine County, California: QuickFacts." Accessed April 20, 2024. https://www.census.gov/quickfacts/fact/table/alpinecountycalifornia/PST045223.
[19] Ibid.

[redacted]

Los Angeles County: Customized IVR (Self-Service and CSC)
Location: Spanning from Malibu to San Bernardino County and from Long Beach to Lancaster
2023 Population: 9,663,345 people[20]
2023 CalFresh Population: 1,576,356 people or 16.3% of total population[21]

☒ **CSC** ☒ **Self-Service IVR** ☒ **Multiple Languages**

Customized IVR and CSC Number: (866) 613-3777
Hours of Operation: M-F from 7:30 AM-6:30 PM (CSC); 24/7 (self-service)
Language(s): 15 languages

Los Angeles is the largest county in California and the United States. Its customized IVR model represents the most thoroughly integrated approach to large-scale CSC operations. The system offers 24/7 self-service options and business-hours assistance from a robust customer service staff operating the lines, all accessible by calling a single number.

Insight
Advocates should avoid assuming that one type of public benefit phone system configuration is inherently superior to another. It is impractical, for example, for Alpine County, with its smaller population, to emulate the complex phone system structure of Los Angeles County. When evaluating a county's phone system, it is essential to consider the community's specific needs and the demands placed on the system. A robust infrastructure might not be necessary for areas with small benefits populations, while a lack of comprehensive infrastructure can prove insufficient for communities with large benefits populations and high call volumes. **Understanding the local context is crucial to identifying interventions that will increase positive, consistent outcomes and customer satisfaction across all 58 county public benefits phone systems. While local circumstances are variable, uniformly excellent customer experiences must be standard.**

[20] U.S. Census Bureau. "Los Angeles County, California: QuickFacts." Accessed April 20, 2024. https://www.census.gov/quickfacts/fact/table/losangelescountycalifornia/PST045223.
[21] California Department of Social Services. "CalFresh Data Dashboard." Accessed April 20, 2024. https://www.cdss.ca.gov/inforesources/data-portal/research-and-data/calfresh-data-dashboard.

Staffing Structures

Interviews for this report focused primarily on customer experiences with county phone systems and revealed significant variations in how counties staff their phones and divide their casework. Two main staffing structures have been identified:

1. **Individual Caseworker ("Case-based") Assignment:** Some counties assign specific caseworkers to customers, handling all related issues.
2. **Task-Based Customer Service:** Other counties operate on a task-based approach, where segments of workers can address a customer's issues based on where the case is in the eligibility process (eg, "intake," "renewals," "change reporting," etc).

Case Studies

1. **Alameda County (Individual Caseworker Assignment)**: A CalFresh applicant described their experience, highlighting several challenges within the system. Upon enrollment, they were assigned a caseworker to assist with claim issues. However, this reliance on one caseworker meant they were subject to the worker's workload and availability, leading to delays in resolving problems. Instead of speaking directly with their caseworker, the applicant often had to leave voicemails, which sometimes went unanswered. Additionally, they frequently found themselves reassigned to new caseworkers without prior notification. This resulted in frustration when contacting the county's social services phone line and providing their case number for identification, only to be transferred to a different caseworker or one unfamiliar with their caseworkers.[22]

2. **San Diego County (Task-Based Customer Service)**: Another CalFresh applicant shared their frustration at not having a designated caseworker. They expressed the inconvenience of having to repeatedly explain their issue to different workers whenever they called for assistance. They believed there should be better record-keeping or workers should review case files before engaging with customers. The interviewee noted significant disparities in outcomes depending on the worker they were connected with via the phone system. Some workers demonstrated a deep understanding of the program, swiftly resolving issues that others struggled with. One specific incident highlighted this discrepancy to the interviewee.

[22] Valerie P. (CalFresh customer) in discussion with author, April 10, 2024.

When San Diego adopted CalSAWS, customers gained the ability to manage their claims online, including accessing digital copies of notices previously sent via mail. This marked a significant improvement over the previous system, which often relied on sending crucial information to potentially incorrect mailing addresses. However, upon exploring the new system, the applicant realized that CalSAWS did not include notices sent by the county before its implementation. Hoping to have a comprehensive record of their case online, they contacted the CSC for help uploading past documents to their account. After several workers were unable to complete the task, the applicant persisted until they found a worker who could resolve the issue by uploading their documents.[23]

Workforce Impact and Broader Implications

The COVID-19 pandemic and heightened reliance on public benefits programs have placed immense strain on social service agencies and their employees. This strain has led to a significant exodus of caseworkers from the public sector nationwide. For instance, in Missouri, a staggering 20% of Medicaid EWs resigned last year. Similarly, at the Texas Health and Human Services Commission, the number of vacant positions for EWs has quadrupled over the span of approximately two years, reaching 1,031 vacancies as of late February 2022, compared to just 260 vacancies reported in March 2020.[24] In San Francisco, the situation is similar, with nearly 100 positions remaining unfilled at the San Francisco Human Services Agency as of January 2024, according to a bargaining representative for SEIU Local 1021, the union representing agency workers.[25]

Insight

Staffing structures play a critical role in shaping customer experiences with county social services. The identified issues and staffing challenges underline the need for strategic improvements to staffing policies and technological support to enhance service delivery and customer satisfaction. Understanding these structures and the issues that arise from them is crucial in identifying and suggesting real solutions, aiming to better support both workers and customers in navigating public benefits systems.

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[23] Anonymous CalFresh customer in discussion with author, March 11, 2024.

[24] Smith, Bram S. "A Staffing Crisis is Causing a Monthslong Wait for Medicaid, and It Could Get Worse." NPR, April 4, 2022. Accessed April 18, 2024. https://www.npr.org/sections/health-shots/2022/04/04/1089753555/medicaid-labor-crisis.

[25] Altenberg, Nik. "SF Social Welfare Workers Protest Proposition F, Saying It Will Exacerbate Agency's Staffing Crisis." KQED, March 21, 2022. Accessed April 18, 2024. https://www.npr.org/sections/ health-shots/2022/04/04/1089753555/medicaid-labor-crisis.

Advocates should note that individual caseworker assignments and task-based casework are equally viable staffing structures with the potential for exemplary service delivery. Slow service and variation in workers' knowledge and abilities may indicate a strained workforce more than a troubled workflow. Interviews with CBO employees consistently revealed a distinct impression that EWs are overworked and underpaid. Balancing compassion for workers while advocating for their customers is a daily tightrope walk for CBOs.

Valerie's Story

A lifelong native of Alameda County, Valerie was living at home with her parents when the county approved her cousin for grocery assistance in 2020. She saw her cousin purchase groceries for the coming weeks with money that had been automatically loaded onto her CalFresh debit card. The additional money would definitely help ease financial burdens at home, so she decided to apply. Still living at home and not yet enrolled in college, Valerie didn't qualify for CalFresh, but she wouldn't soon forget about the program.

After leaving her family home and starting summer school at UC Berkeley, Valerie applied again. One day, after submitting her application online, she received an unexpected phone call from a local phone number. She quietly slipped out of class and completed her CalFresh interview on the spot. This time, Valerie qualified for benefits as a CalGrant recipient, working on campus and living independently. However, her feeling of relief was short-lived.

She faced repeated administrative hurdles, receiving a cancellation notice due to alleged account inactivity that did not match the timeline of her actual application, followed by a disruption in her benefits just as she started to rely on them. Her benefits were erroneously canceled again and again between her initial application and moving back home in the winter of 2022. Despite these setbacks, she reapplied, facing similar issues of delayed and inaccurate communications, including a recertification notice that arrived after the deadline. Her frustration was compounded by repeated miscommunications about her employment status.

Under previous circumstances, Valerie would have given up, but things were different now. She was interning for a state senator in Sacramento. After hearing about her struggles, a fellow staffer suggested that she try pulling governmental strings. After

contacting her Alameda County Supervisor's office, her case was expedited by the director of the Social Services Agency.

After numerous calls and emails, and with intervention from Senate and County Supervisor staff, Valerie's issues were finally resolved, and she received the back payment of the benefits she was entitled to. However, her story highlights the persistent challenges and systemic barriers that many Californians face with public benefits.

The remainder of this report will explore how to address these systemic issues to ensure a more dignified experience for all CalFresh applicants.[26]

Defining Dignity

Dignity in the context of accessing public benefits underscores the profound importance of treating individuals with unwavering respect throughout every stage of the process. It is about ensuring that the path to obtaining and managing existing benefits is clear and without unnecessary obstacles or bureaucratic complexities. This includes counties' responsibility to craft navigable and equitable systems for all applicants. Moreover, dignity demands that agencies administering these benefits uphold fairness and respect in their interactions, offering sufficient support and resources to address any hurdles or inquiries faced by applicants. Ultimately, dignity in accessing public benefits safeguards individuals' ability to fulfill their basic needs while upholding their autonomy and preserving their inherent sense of self-worth.

Identifying Barriers

Wait Time

Wait time stands out as the primary obstacle reported in county public assistance phone systems. When asked about the most common barriers clients face using the CalSAWS phone system, every CBO employee interviewed identified wait times. Similarly, when CalFresh customers were questioned about potential improvements to the phone system, every respondent highlighted wait times as an area needing attention.

Wait times represent more than mere inconveniences; they are systemic barriers that often prove insurmountable for individuals seeking access to public benefits.

[26] Valerie P. (CalFresh customer) in discussion with author, April 10, 2024.

Fig. 3 & Fig. 4: CalFresh customer comments posted to a message board



Source: www.reddit.com/r/foodstamps

CalFresh customers often work and hold jobs with limited scheduling flexibility. 29% of CalFresh households have earned income. In contrast to their higher-wage and higher-income counterparts—of whom 57 percent have control over when they take breaks during the day—only 33 percent of low-wage and low-income workers enjoy similar autonomy.[27] A five-year study revealed that 78% of parents with low incomes worked jobs offering no flexibility whatsoever.[28] Additionally, low-wage workers frequently face job repercussions or termination when they lack the flexibility to manage routine family emergencies or anticipated personal or family matters. A system that demands time from those with the least to spare is fundamentally flawed.

Journalist Annie Lowrey vividly illustrates the burden placed on individuals by inefficient government processes, dubbing it a "time tax." This concept is particularly poignant in the context of accessing public benefits like food stamps. **Low-income individuals often invest significant time and effort in navigating complex application procedures, enduring lengthy wait times and contending with bureaucratic delays. This time tax, as Lowrey argues, disproportionately affects**

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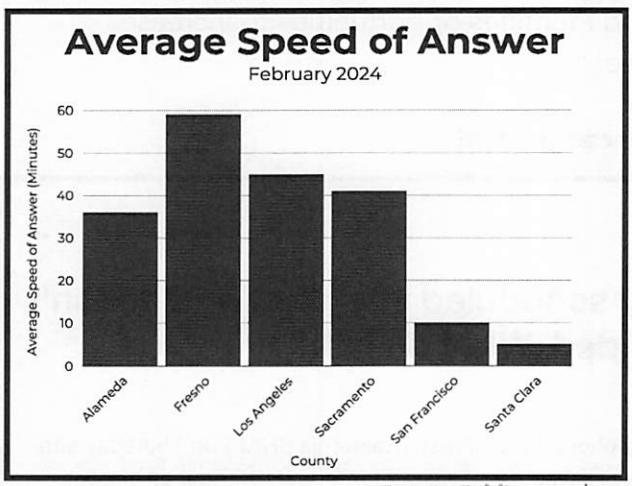
[27] Bond, James T., and Ellen Galinsky. What Workplace Flexibility Is Available to Entry-Level, Hourly Employees? Families and Work Institute, November 2006. https://cdn.sanity.io/files/ow8usu72/production/ eaa3e2e146968fa451c5015a292f1278abfd6bd8.pdf. Accessed April 9, 2024.

[28] Heymann, Jody. *The Widening Gap*, 133. New York: Hachette, 2001.

those who rely on public benefits, effectively imposing an additional cost in terms of their time and energy. While the concept of administrative burden is well-known, framing it as a regressive tax underscores how bureaucratic inefficiencies exacerbate inequality by disproportionately burdening those least able to afford it.[29] [30]

Fig. 5: County CSC Average Speed of Answer Data



Source: Public records

There is insufficient evidence to suggest a universally ideal wait time. However, industry research conducted by American Express in 2014 found that customers were unwilling to wait on hold longer than 13 minutes. A 2017 study conducted by Arise, a customer experience firm, found that ⅔ of the surveyed customers found wait times of less than two minutes to be acceptable, with 13% of respondents rejecting wait times entirely.[31]

The simple fact is that any time spent waiting is less than optimal and, in the public sector, inequitable. Zero minutes spent waiting is ideal. Customers may be willing to wait longer when it comes to basic needs, but for government agencies interested in providing quality services, **setting benchmarks more in alignment with the private sector findings–between 2 and 13 minutes–may be part of a broader strategy to ensure customers have quality experiences when contacting call centers.**

In addition to setting a wait time benchmark, focusing on wait time reduction may be helpful. How do we decrease CSC wait times over time? Emphasizing "over time" is important as government agencies move slowly, and responsible systems change should move at the speed of intentional action.

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[29] Office of Management and Budget - Office of Information and Regulatory Affairs. *Burden Reduction Straegies*. December 2022. https://www.whitehouse.gov/wp-content/uploads/2022/12/Burden ReductionStrategies.pdf. Accessed March 27, 2024.

[30] Lowrey, Annie. "The Time Tax: Why Is So Much American Bureaucracy Left to Average Citizens?" The Atlantic, July 27, 2021. https://www.theatlantic.com/politics/archive/2021/07/how-government-learned-waste-your-time-tax/619568/. Accessed April 15, 2024.

[31] Hornberger, Peter. "3 Strategies to Reduce Call Center Average Wait Time." Bright Metrics, September 21, 2022. Accessed May 15, 2024. https://brightmetrics.com/blog/reduce-call-center-average-wait-time#:~:text=Three%20years%20later%2C%20a%20similarly,align%20with%20their%20 business%20goals.

Note: The American Express and Arise studies were not available for review as primary sources.

This report proposes analyzing customer experiences to pinpoint opportunities for reducing wait times, alleviating the impact of the time tax, and enhancing equity within the system. To do this, it is essential to understand why customers are picking up their phones in the first place. The following section explores the reasons why customers often need assistance
beyond what an IVR system can provide and identifies opportunities to increase efficiency and improve customer experience.

Fig: 6: CalFresh customer comments posted to a message board



Source: www.reddit.com/r/foodstamps

Missed Interviews

Many individuals interviewed for this report cited missed intake and recertification interviews as a leading reason for contacting their county's social services agency. Reasons for these missed interviews include:

- County calls displaying as unidentified numbers on caller ID.
- Scheduling notices arriving after the required action date.
- Conflicts with work or family schedules.
- Lack of awareness about the interview requirement.

Benefits Withheld Due to Administrative Errors

Customers often become aware of issues with their claims only after their funds are unexpectedly withheld, which pushes them into sudden financial hardship. Lacking detailed explanations, they typically resort to calling their county social services agency as the quickest way to address the problem. This abrupt interruption in service breeds distrust in the system. During such calls, customers seek immediate help and confirmation from an EW that their benefits will be restored.

During an interview for this report, a single mother working at a CBO in San Diego County shared her experience of missing two months of benefits due to administrative errors. After receiving a reminder about her upcoming SAR7 report, she completed and submitted it on time via the BenefitsCal customer portal. Despite her timely submission, her benefits were stopped without any explanation. She expressed frustration over the reliance on physical paperwork and the delays it caused. The EW explained that there was a known issue with BenefitsCal uploads not appearing in CalSAWS, which often resulted in customers' documents entering a digital void. Consequently, this technological glitch led to benefits being withheld through no fault of the customers, prompting unnecessary calls to the hotline.[32]

Unclear Income Verification Requirements for Gig Workers

A 2024 report by Flex, an advocacy group for app-based rideshare and delivery services, notes that California is home to approximately 870,000 app-based gig workers.[33] These workers are classified as independent contractors and typically lack traditional pay stubs for income verification. Interviews with individuals in Los Angeles and San Diego highlight the public benefits system's difficulties in accommodating non-standard income verification methods.

One customer reported earning around $5 per survey through online platforms, and another worked as a delivery driver for DoorDash. Both struggled to provide the conventional pay stubs required by the county. For example, the customer from Los Angeles tried to verify her income by submitting screenshots of her DoorDash payment history. However, accepting alternative documentation was inconsistent among EWs; some accepted the screenshots, while others rejected them. This inconsistency led to

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[32] Anonymous CalFresh customer in discussion with author, March 18, 2024.

[33] Public First. *U.S. App-Based Rideshare and Delivery: Economic Impact Report.* Flex Association, 2024. https://www.flexassociation.org/wp-content/uploads/2024/03/Flex-Economic-Impact-Report-2024.pdf. Accessed April 4, 2024.

the need for multiple calls to the county hotline, compounding the difficulty and delaying what should have been a straightforward verification process.[34] [35]

Dropped Calls

Interviews revealed that dropped calls are a persistent source of frustration for both customers and CBO employees. Instances were reported where the system abruptly terminated calls without warning, which can be especially aggravating after experiencing difficulty getting through the queue or navigating the call flow. While some dropped calls may stem from technical glitches, others may result from system design choices.

A notable challenge in addressing dropped calls is the lack of tracking in Amazon Connect analytics. The system currently monitors abandoned calls (those disconnected by the customer), overall call volume, and calls answered. Although a rough estimate of dropped calls can be inferred by subtracting the sum of abandoned, answered, and callback calls, a dedicated metric for dropped calls would provide more accurate insights. Additionally, there is no official record of calls released when the system reaches its maximum queue capacity, compounding the challenge of understanding and addressing dropped calls.

Analysis of CalSAWS planning documents and county call flows indicate three design-related reasons that calls may be dropped, including:

1. **System-Designed Released Calls:** County call flow analysis identifies several reasons for releasing calls from the system. Calls are often released due to a caller's lack of response to a prompt, which helps minimize the number of inactive calls in the system.

2. **Failed Verification:** When agents transfer customers into the system, it prompts them to input numerical information like their phone number, social security number, or birthdate. Alternatively, they can use voice recognition to connect with their case number in CalSAWS. If the system cannot match the caller's provided information or voice with a case number, it informs them that it cannot process the request and then disconnects the call.

[34] Anonymous CalFresh customer in discussion with author, March 11, 2024.
[35] Anonymous CalFresh customer in discussion with author, March 25, 2024.

Customers with unidentifiable information may benefit more from being placed into a customer service queue for further assistance after fewer attempts rather than being disconnected abruptly.

The issue of voice recognition highlights the limitations of IVR systems in general. Without careful design considerations hearing, vision, and cognitively impaired communities, disabled communities, and non-English-speaking and non-Native English-Speaking communities may struggle to navigate IVR systems and eventually forfeit their access to benefits out of frustration and exclusion. Voice recognition technology has even been found to discriminate against Black Americans, as the spoken language databases used to train systems are often biased toward white Americans voices and vernacular.[36] Awareness of the limitations of IVR technology can aid in directing advocates' attention toward issues that may arise in the future or are already bubbling under the surface.

3. **Failed Callback Scheduling:** In some county call flows, the scheduled callback function is enabled to assist customers efficiently. However, if a system error occurs during the process of scheduling a callback, the call is released. This means that even after the customer has opted in, selected a callback time, and provided their phone number, they may be unexpectedly disconnected at this stage.

Further qualitative research is needed to identify other circumstances under which calls are dropped and how they are handled. Of particular concern are situations where a dropped call occurs while a customer is actively connected with an EW. Are EWs able to call customers back, and is this standard operating procedure? Implementing callback protocols for dropped calls is a clear opportunity to increase customer satisfaction.

Measuring CSC Performance and Customer Experience

Learning from the Private Sector

In the private sector, CSC performance metrics play an essential role in assessing the quality of service delivery. These metrics provide valuable insights into customer satisfaction, operational efficiency, and overall business performance. Key metrics such as first call resolution, average handling time, customer satisfaction scores, and net promoter scores help businesses evaluate their performance, identify areas for

[36] Koenecke, Allison, Andrew Nam, Emily Lake, Joe Nudell, Minnie Quartey, Zion Mengesha, Connor Toups, John R. Rickford, Dan Jurafsky, and Sharad Goel. "Racial Disparities in Automated Speech Recognition." *PNAS* 117, no. 14 (April 7, 2020): 7684-7687. https://www.pnas.org/doi/ epdf/10.1073/ pnas.915768117. Accessed April 18, 2024.

improvement, and make data-driven decisions to enhance customer experience. By closely monitoring these metrics, companies can ensure that they are meeting customer expectations, optimizing resources, and maintaining a competitive edge in the market.

Challenges in the Public Sector

Implementing similar performance metrics in a public sector CSC can pose significant challenges. Unlike the private sector, where profitability and customer satisfaction are primary objectives, public sector organizations often prioritize regulatory compliance, social equity, and public service delivery. The nature of county social services, such as welfare assistance, healthcare, and social security, can make it difficult to measure customer satisfaction using traditional metrics. Public sector organizations may face bureaucratic hurdles, limited funding, and resistance to change, making adopting new performance measurement systems challenging.

Additionally, the diverse needs and expectations of customers served by public sector organizations can complicate the development and implementation of standardized metrics that accurately reflect customer experience.

Despite these challenges, tracking and reporting CSC performance and customer experience metrics in the public sector is essential.

Performance Metrics

While California is not required by federal mandate to monitor CSC performance for SNAP, it remains accountable to the federal government for the program's effective and efficient administration. Given the interconnectedness between CSC performance and program enrollment, the state has an interest in actively overseeing data collection, pinpointing key metrics, and establishing benchmarks for CSC performance.

In tandem with addressing common barriers in county public benefit phone systems, advocates should continue stressing the importance of CSC data reporting and sharing by county and state agencies. This is critical to enhancing agency transparency and revealing potential areas for future advocacy efforts. By measuring and sharing information on CSC performance, agencies can demonstrate accountability to the public while advocates gain insights into areas needing improvement. This collaborative approach fosters a more transparent and responsive public benefits system, benefiting the government, service providers, and customers.

To this end, the Amazon Connect dashboard can track and report on nearly 150 unique metrics. However, it does not track any of the common CSC customer experience metrics.

The metrics outlined below are considered fundamental for CSCs, as highlighted in materials from private communication companies such as Twilio, Genesys, Nextiva, and ICMI. While these metrics have not undergone extensive academic research, they are widely employed in corporate settings and merit consideration for adoption within the public sector.

Common Performance Metrics	
***Abandonment Rate:** *Frequency of customers hanging up before reaching an EW*	• Reflects the effectiveness of CSC call-holding procedures. • May suggest that customers are experiencing long wait times before connecting with EWs.
***Average Handle Time:** *Total duration of a customer inquiry, from the initial contact, including any time spent on hold or waiting, up to the resolution.*	• May reflect the expertise of EWs and the efficiency of customer service protocols. • A very low AHT may indicate that issues are being rushed and not thoroughly resolved.
***Average Hold Time:** *Duration during which an EW puts a caller on hold, whether to handle another call or to research the caller's issue.*	• Longer hold times may lead to increased customer frustration and dissatisfaction. • May also reveal the adequacy of staffing levels to handle call volume.
***Average Speed of Answer:** *Average time it takes for an EW to answer a call.*	• Gauges the responsiveness and service quality perceived by customers. • Called "average queue answer time" in Amazon Connect.

Callback Requests Rate: *Frequency of callers opting for a callback instead of waiting on hold.*	• High callback requests may signal insufficient staffing or resources to handle inbound calls.
Repeat Calls Rate: *Frequency of calls from the same number.*	• May indicate unresolved problems from initial contacts. • Can be used to identify frequently occurring customer issues.
***Transfer Rate:** *Frequency of calls transferred from one agent or department to another to resolve issues.*	• Although some transfers are inevitable, multiple transfers may cause customer frustration. • CSCs should aim to keep them to a minimum.

Customer Experience Metrics	
Customer Satisfaction Score (CSAT): *Measurement of customer satisfaction with a CSC's service delivery.*	• CSAT assessments typically occur at the conclusion of a customer survey, employing a five-point scale to gather feedback. • Responses may range from "Highly satisfied" to "Highly unsatisfied" or any similar ranking system.[37]
First Call Resolution Rate (FCR): *Measurement of CSC's ability to resolve a customer's issue during their initial contact without needing to follow up again for the same issue.*	• A high FCR may indicate that a CSC is efficient in resolving issues. • May also suggest that customers do not need to spend additional time contacting support multiple times for the same issue.
Net Promoter Score (NPS): *Measurement of customer loyalty and satisfaction.*	• Asks the question, "*How likely are you to recommend this CSC to a friend or colleague?*"

[37] Isaacs, Brooke, and Nathalia Velez Ryan. "Metrics Every Contact Center Should Track." Twilio Blog. Accessed April 3, 2024. https://www.twilio.com/en-us/blog/metrics-every-contact-center-should-track.

	• Responses are typically given on a scale from 0 to 10, and responders are categorized into three groups:
	  ○ Promoters (score 9-10)
	  ○ Passives (score 7-8)
	  ○ Detractors (score 0-6).
	• NPS is calculated by subtracting the percentage of Detractors from the percentage of Promoters, resulting in a score that can range from -100 to +100.[38]

* *Denotes a metric that the Amazon Connect dashboard can currently track*

While each of these metrics provides valuable information, using them to interpret CSC performance without considering their operational context carries risks.

For example, blindly interpreting a low average handle time (AHT) as high performance could miss situations where management has placed excessive emphasis on AHT as the primary performance measure. Workers may feel pressured to rush through calls to meet arbitrary time targets, potentially compromising customer service quality. This focus on speed over quality can result in increased call escalations, higher rates of call abandonment, and diminished customer satisfaction.

Similarly, viewing high first-call resolution rates as an indicator of success without an understanding of the practices leading to these rates may conceal that workers are resolving issues hastily without fully addressing customers' needs. While resolving inquiries on the first call is desirable, it is equally crucial to ensure that customers receive comprehensive solutions that effectively resolve their concerns to avoid a higher likelihood of callbacks or customer dissatisfaction in the long run.

Interpreting performance metrics without analyzing their operational context may fail to capture the complexity and nuances of customer interactions. Customer satisfaction is influenced by various factors, including agent empathy, problem-solving skills, and communication effectiveness, which cannot be adequately measured by conventional performance metrics alone.

[38] Genesys. "The Definitive List of 29 Call Center Metrics and KPIs." Genesys Blog. Accessed April 3, 2024. https://www.genesys.com/blog/post/the-definitive-list-of-29-call-center-metrics-and-kpis

INSIGHT
No single CSC performance metric can accurately measure successful service delivery. To ensure holistic assessment and drive continuous improvement, evaluation frameworks that balance multiple performance metrics in conjunction with qualitative feedback (CSAT, FCR, and/or NPS) and operational insights such as staffing rates and structures should be developed. By embracing a more comprehensive approach to performance monitoring, CSCs can better meet customer needs and ultimately deliver customer service experiences that uplift customers.

Required Reporting
While the federal government mandates the reporting of SNAP administrative data, **there are currently no federally or state-mandated requirements for collecting or reporting SNAP CSC performance or customer service data**. As part of its SNAP quality control efforts, the USDA collects data on certain metrics that can be used to gauge customer experience indirectly. However, these metrics do not directly evaluate the CSC experience.

SNAP Quality Control metrics include the following:

1. **Application Processing Timeliness (APT):** Measures the timeliness of states' processing of initial SNAP applications. The Food and Nutrition Act of 2008 entitles all eligible households to SNAP benefits within 30 days of application or within 7 days if they are eligible for expedited service.
2. **Payment Error Rate (PER):** Gauges how accurately a state agency determines SNAP eligibility and benefit amounts. Errors include both overpayments—when households receive more benefits than they are entitled to—and underpayments—when households receive less benefits than they are entitled to.
3. **Case and Procedural Error Rate (CAPER):** Assesses the accuracy of state agency actions in cases in which applicants were denied, terminated, or suspended and did not receive benefits. It also measures a state's compliance with federal procedural requirements, including the timeliness and accuracy of notifications sent to affected households.

Although these metrics are related to many of the reasons customers call CSCs, as outlined in this report, they do not directly measure CSC performance. However, there is precedent for mandated CSC performance reporting. The Centers for Medicaid and Medicare Services (CMS) mandates monthly reporting of call center volume, wait times,

and abandonment rates from CSCs serving Medicaid enrollees.[39] California legislators are currently leveraging these CMS reporting requirements to push for increased CSC reporting and transparency at the state level.

SB-1289

Collecting call center data is a substantial challenge for advocacy organizations due to the extensive time and resources required to obtain information from 58 separate county agencies. **If CSC performance data were routinely published, it would significantly lessen advocates' investigative workload and increase government transparency.**

Building on federally mandated CSC performance reporting requirements, Senator Roth has introduced SB-1289, co-sponsored by the Coalition of California Welfare Rights Organizations and the Western Center on Law & Poverty. This bill proposes that counties report CSC performance to the Department of Health Care Services on a quarterly basis. Additionally, it requires the department to establish statewide minimum standards for assistance provided by county CSCs to applicants or beneficiaries applying for, renewing, or seeking help in obtaining or maintaining Medi-Cal coverage. Finally, the bill requires counties to generate a quarterly report identifying challenges and targets or standards for improvement. All reports would be made publicly available within 45 days of the quarter's closure.[40]

Expanding on the existing requirements of SB-1289, quarterly reports should incorporate details about staffing levels and business operations. As previously discussed in this report, raw data alone cannot provide a comprehensive understanding of the customer experience. Analyzing data within the framework of a CSC's business operations can enable a more nuanced interpretation of the data. This approach allows for better comparison of CSC performance across counties and provides greater insight into overall CSC functionality.

While SB-1289 benefits from existing federally mandated reporting, it could serve as a model for similar legislation regarding CalFresh CSC standards. Additionally, there is merit in advocating for amendments to require reporting on overall CSC performance and disaggregated data by program, considering that most counties with CSCs handle traffic for programs beyond Medi-Cal. Garnering legislative support would be

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[39] Centers for Medicare & Medicaid Services. "Training Materials for State Staff: Overview of the Medicaid
and CHIP Eligibility and Enrollment Performance Indicators." September 2015. Accessed April 19, 2024. https://www.medicaid.gov/medicaid/downloads/overview-of-performance-indicator- project.pdf.

[40] California State Senate. "SB 1289: Medi-Cal: Call Centers: Standards and Data." LegiScan. Accessed May 4, 2024. https://legiscan.com/CA/text/SB1289/id/2976638.

instrumental in advancing either an amended SB-1289 or separate legislation for CalFresh CSC reporting.

Recommendations

The challenges Californians encounter when trying to access public benefits via county phone systems demand the collective efforts of advocates, county social services administrators, state departments, and legislators. Limited accessibility is a systemic barrier that particularly impacts low-income individuals. Advocates can drive change by urging local agencies to adopt the following recommendations, reducing unnecessary hurdles and promoting fairer access to essential public benefits for all Californians. Tackling these issues will require collaboration, innovation, and a commitment to a more dignified CalFresh experience.

This report proposes the following recommendations to decrease wait times, enhance system efficiency, and improve customer experience:

State-Level Recommendations

1. Measure Both CSC Performance and Customer Experience
2. Require Public Reporting of CSC Performance and Customer Experience Data
3. Develop a CSC Performance Evaluation Formula

County-Level Recommendations

4. Increase CBO Access to EWs and Enrollment Information
5. Enable Amazon Connect Callback Features
6. Utilize CalSAWS Email And Text Notification Capabilities
7. Implement "Place-in-Line" Updates
8. Adopt the BenefitsCal Scheduling Request Tool
9. Identify County Social Service Agency Calls on Caller ID
10. Ensure Eligibility Workers Are Trained on All Self-Employment Income Verification Protocols

CalSAWS & County Recommendations

11. Identify Frequently Ended Call Nodes
12. Disaggregate Dropped Calls, Abandoned Calls, And Maximum Capacity Releases
13. Audit Printing and Mailing Operations Regularly and Require Postmarks

1. **Measure Both CSC Performance and Customer Experience**
   Including customer service metrics like net promoter score, customer satisfaction score, and first call resolution in CSC performance evaluation is crucial for assessing the quality of service provided and understanding customer perceptions and experiences. By incorporating these metrics, counties can gain a more holistic understanding of customer experience, identify areas for enhancement, and prioritize initiatives aimed at delivering exceptional customer service.

2. **Require Public Reporting of CSC Performance Data**
   Like the private sector, where customer service metrics drive business decisions, public sector organizations should be accountable for delivering quality service. Additionally, adopting private sector metrics like customer satisfaction scores and net promoter scores could help guide efforts to enhance the overall customer experience.

   Requiring call center reporting through legislation like SB-1289 would ensure agencies follow consistent standards, make performance data transparent, and allow advocacy organizations and the public to hold them accountable for service delivery.

   Advocating for legislative action is crucial to improving call center operations. Identifying supportive legislators is essential, though counties may resist additional oversight.

3. **Develop a CSC Performance Evaluation Formula**
   No single CSC performance or customer experience metric can accurately measure successful service delivery. Rather than focusing on metrics and standardized benchmarks, creating a formula that can account for staffing levels,

call volume, and key performance metrics could facilitate a more nuanced understanding of CSC performance across all 58 counties.

Additionally, implementing an evaluation formula could discourage CSC managers from focusing too narrowly on individual aspects of performance and adopting operational practices that focus on numbers over customer experience. Any effort to evaluate CSC performance should be holistic and contextual.[41]

4. **Increase CBO Access to EWs and Enrollment Information**
CBOs are essential to the public benefits ecosystem, providing invaluable guidance to customers and reducing the workload of EWs while boosting program enrollment. That many CBOs receive public funding is a clear acknowledgment of the importance of their government partnerships. Allowing CBOs greater access to EWs and information resources would greatly increase the return on this substantial public investment by decreasing the time CBOs wait and increasing the number of customers CBOs can assist.

Read-Only Access would allow CBOs to quickly access customer information without modifying the data, reducing the risk of errors and ensuring data integrity. By accessing client data in CalSAWS, CBOs can more effectively manage cases by understanding the current status of applications, benefit levels, and any issues that may need resolution.

As a result of its close working relationship with the San Francisco Human Services Agency, SFMFB CalFresh Outreach staff have now gained read-only access to their customers' case information in CalSAWS. Even with limited access to information, they are now able to answer many customer inquiries without needing to call the CSC.[42]

Priority Phone Access would allow CBOs to help more customers faster, increasing both CBO and EW productivity. This could look like a dedicated CBO phone line or priority queue ranking within the phone system. Priority access

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[41] Wagner, Jennifer. "Understanding Unwinding: What to Know About Medicaid Call Center Data." Center on Budget and Policy Priorities, July 6, 2023. https://www.cbpp.org/blog/understanding-unwinding-what-to-know-about-medicaid-call-center-data#:~:text=Federal%20law%20requires %20states%20to,April%202023%20through%20 June%202024. Accessed April 22, 2024.

[42] Sandoval, Liliana. Personal interview. March 19, 2024.

lines could be especially helpful in counties where CBOs lack read-only access in CalSAWS and still rely on EWs for case information.

San Diego County has already adopted this recommendation. CBOs in San Diego can request a Personal Identification Number (PIN), granting them access to a priority line. Anae Evangelista, the CalFresh Program Coordinator at the San Diego Hunger Coalition, reports that wait times on this priority CBO line usually range from 5 to 10 minutes, a substantial improvement compared to the 30 to 40-minute waits often encountered on the public line.[43]

Another CBO employee, who preferred to remain anonymous regarding their location, has initiated an informal arrangement for priority access. While assisting customers by calling the county, this CBO employee consistently connected with the same county representative. With each interaction, they efficiently processed multiple claims and swiftly resolved issues. Their collaboration became so effective that the county representative now contacts the CBO directly every morning to address case matters from the previous day. Scaling up this cooperative effort could yield significant benefits for their community.[44]

5. **Enable Amazon Connect Callback Features**
   Callback features in CSC phone systems offer various benefits, including reducing wait times, evenly distributing call volume, improving accessibility, and enhancing the overall customer experience. When a caller opts for a courtesy callback, they provide their phone number, and the system saves their place in the queue, reaching out to them when it's their turn.

   Additionally, when queues are full, or the CSC is closed, the system can schedule callbacks for the next business day. Callers select a convenient call window and provide their phone number, and the system integrates this into the workflow for the following day.

   In 2023, the Los Angeles County CSC made an average of 28,861 courtesy callbacks per month, nearly all of which were accepted by callers. On average, approximately 25,243 callbacks were successfully connected each month. Over the course of a year, this callback feature spared an estimated 300,000

[43] Evangelista, Anae. Personal interview. March 6, 2024.
[44] Anonymous CBO employee. Personal interview. March 28, 2024.

[redacted]

customers the frustration of waiting on hold, significantly reducing the time tax experienced by Angelenos relying on public benefits.

However, managing callback features presents challenges for CSC managers. These features typically activate when queues are at maximum capacity or wait times exceed a set threshold determined by call center management. Ensuring an optimal callback experience requires careful monitoring of the entire system.

Scheduled callbacks can impact the following day's operations, and balancing the number of available callbacks to avoid overburdening the CSC while meeting customer needs is a significant challenge. Concerns about creating a backlog of calls may lead to hesitation in adopting callback features. Still, the potential benefits for enhancing the customer experience justify further exploration of this feature.

6. **Utilize CalSAWS Email and Text Notification Capabilities**
   CalSAWS offers text and email notification features that can provide customers with the following information:

   - Appointment reminders
   - Missing document notifications
   - Semi-Annual Report and Recertification reminders
   - Semi-Annual Report and Recertification status updates
   - CalWORKs and CalFresh benefit amounts

   Customers frequently suggest text and email-based communications as desired improvements. For example, in customer interviews, a respondent who applied for benefits in both Ventura and Los Angeles counties noted the effectiveness of text and email notifications in the latter, which reduced delays experienced with mailed notices.[45] However, no comprehensive inventory currently details which counties utilize these communication channels. A county-by-county confirmation is necessary to determine the extent of implementation.

   Additional Customer Service Considerations
   Counties can enhance customer service by leveraging additional optional functions alongside email and text notifications and the appointment scheduling tool. Currently, BenefitsCal messaging operates one way, from caseworkers to

[45] Anonymous CalFresh customer in discussion with author, March 25, 2024.

[redacted]

customers. Enabling "Two-Way Messaging" would allow customers to communicate with CSC staff via email instead of making phone calls. Implementing "Click to Chat" would enable real-time chat between customers and caseworkers.

CSC managers should gradually introduce additional functions to ensure staff receives adequate training and troubleshoot issues in real-time. A gradual rollout would allow managers to monitor staffing impacts via Calabrio, the CalSAWS contracted workforce management software, and identify optimal staffing levels for each communication channel.

While each function can potentially reduce call volume, further investigation and analysis are needed to quantify the impact of enabling additional communication channels. Adopting two-way messaging or click-to-chat functions may require increased staffing. Providing system impact projections could be a persuasive advocacy tool to encourage counties to enable more existing CalSAWS functions

7. **Implement "Place-in-Line" Updates**

Many interviewees expressed frustration with phone systems' inaccurate wait time estimates. For instance, one interviewee from San Diego County shared that inaccurate estimates heightened their frustration and increased their likelihood of abandoning calls.[46] When asked about their preferences, many interviewees preferred either an accurate wait time estimate or a place-in-line update over receiving inaccurate wait time estimates or no information.

Implementing this system change, at no additional cost to the county, is entirely feasible within the Amazon Connect system and has been done before. For example, in September 2023, the Social Services Agency of Santa Clara County submitted a CalSAWS Enhancement Request (CER) to replace wait time estimates with position-in-line information. They noted that "the wait time is not accurate. This causes frustration in customers when the system is stating a certain wait time but [they] are waiting longer than expected."[47] This change requires filing and approval of a CER by the appropriate CalSAWS committee. However, transparency in the approval process is limited, making it challenging to assess how easily this change might be implemented.

[46] Anonymous CalFresh customer in discussion with author, March 11, 2024.
[47] Marjorie J. Raudez. "CalSAWS Enhancement Request: CA 226837." CalSAWS, September 28, 2023. https://www.calsaws.org/wp-content/uploads/2024/01/CER-CA-268580.pdf. Accessed April 11, 2024.

8. **Adopt the BenefitsCal Scheduling Request Tool**
   The CalSAWS customer-facing website, BenefitsCal, offers the following functions:

   - View existing appointments
   - Cancel existing appointments
   - Request to reschedule existing appointments
   - Request new appointments

   Not all counties have activated the feature, but adopting this tool and reducing reliance on time-sensitive paper documents could minimize missed appointments due to mail delays or address changes while improving customer proficiency with the BenefitsCal website.

   The effectiveness of the scheduling request tool hinges on whether staff need to review and approve requests. If additional administrative tasks are required, they might outweigh the benefits of reducing scheduling-related phone calls. However, automated scheduling request processing, which is not currently available in any county, could yield better results without adding extra work for EWs. Yet, automation might decrease EW's autonomy.

9. **Identify County Social Service Agency Calls on Caller ID**
   A 2020 Pew Research survey indicated that 67% of Americans avoid answering calls from unidentified numbers, highlighting a prevalent trend in call response behavior.[48] Introducing caller identification for calls from county social service agencies could address this issue by increasing call recognition. This measure could significantly increase the answer rate for crucial processes like intake and recertification interviews, consequently improving service delivery efficiency.

   However, in January 2023, Assembly Member Davies proposed AB-94, aiming to require caller identification display for county social service calls.[49] Despite its potential benefits, the bill faced concerns from domestic violence survivors and advocates, who voiced concerns about confidentiality and safety. They

[48] McClain, Colleen. "Most Americans Don't Answer Cellphone Calls from Unknown Numbers." Pew Research Center, December 14, 2020. https://www.pewresearch.org/short-reads/2020/ 12/14/most-americans-dont-answer-cellphone-calls-from-unknown-numbers/#:~ :text=The%20majority%20of%20Americans%20(67,voicemail%20if%20one%20is%20left. Accessed April 21, 2024.

[49] California State Assembly. "AB 94: Administration of Public Social Services: Blocked Telephone Calls." Leg Info. Accessed April 28, 2024. https://legiscan.com/CA/text/SB1289/id/2976638.

emphasized that domestic abusers often monitor victim communications, and any breach of confidentiality, such as revealing the name of a social services agency on caller ID, could jeopardize victim safety. Ultimately, the bill was not passed.

Moving forward, efforts to implement caller identification for county social service calls should carefully consider the perspectives and support of domestic abuse survivors and advocates, such as allowing customers to opt in to an anonymous display. Ensuring individual safety and increased answer rates' potential benefits is crucial for effective service delivery and public welfare.

10. Ensure Eligibility Workers Are Trained on All Self-Employment Income Verification Protocols

As gig work becomes increasingly common in California, it is crucial for counties to ensure that EWs are well-trained to assist this demographic effectively. In May 2019, the California Department of Public Services issued guidelines directing county agencies to process applications from gig workers under self-employment protocols. This involves applying a standard 40% deduction to net earnings for business expenses and accepting specific income verification documents, such as pay stubs or self-attestation letters.[50]

The enrollment experiences of gig workers often hinge on the knowledge and discretion of individual EWs. According to a report from Code For America, this process involves "human interpretation, which might be influenced by knowledge of rules, precedents, local practices, and even psychological factors like priming"[...].[51] Training EWs to identify gig workers as self-employed and offering them the full range of income verification options could streamline the application process, reducing the need for gig workers to make multiple calls to CSCs.

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[50] Wade, Kim M. All County Information Notice No. I-31-19. California Department of Social Services, May 9, 2019. https://www.cdss.ca.gov/Portals/9/ACIN/2019/I-31_19_ES.pdf?ver=2019-05-15-143511-943. Accessed April 22, 2024

[51] Gianella, Eric, Cesar Paredes, and Julie Sutherland. "Overcoming Barriers: Helping Self-Employed Applicants Access Their Full CalFresh Benefit." Code for America, October 9, 2019. Accessed May 2, 2024. https://codeforamerica.org/news/helping-self-employed-applicants-access-their-full-calfresh-benefit/.

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11. Identify Frequently Ended Call Nodes

While examining call flows on paper provides a starting point for identifying nodes where the system terminates calls, it may not uncover underlying issues at other points. Data analysis is essential to identify these issues. Regular reporting on the most common locations where calls are dropped would enable the detection of potential flaws in the call flow and facilitate more targeted adjustments. These insights can help CSC managers proactively address issues, leading to improved call handling and customer satisfaction.

12. Disaggregate Dropped Calls, Abandoned Calls, And Maximum Capacity Releases

The lack of specific data on dropped, abandoned, and maximum capacity released calls presents a challenge in accurately assessing the extent of disconnected calls. Without this information, effective data analysis becomes difficult. For example, an 8-minute wait time can vary significantly depending on whether all calls are answered by agents or if some are released due to maximum queue depths. Understanding the system's performance in serving all callers, not just those who successfully connect, requires knowledge of the number of people unable to access the system at all. Obtaining data on disconnected calls is crucial for evaluating the system's overall effectiveness and inclusivity.

Addressing dropped calls may be particularly difficult from an advocacy perspective. Amazon Connect has yet to collect much of the information needed to identify challenges. Additionally, agencies that may already be short-staffed will need to analyze this data. Without an understanding of the scale of the problem, which cannot be determined without the missing data, it may be difficult to motivate administrators to address the issue. Advocates may find it helpful to document the precise circumstances under which customers they assist have experienced dropped calls.

13. Regularly Audit Printing and Mailing Operations and Require Postmarks

Printed materials are crucial for customers like seniors, those without internet access, and individuals with accessibility needs. Regular audits of printing processes, often handled by statewide services, are essential to ensure timely printing and delivery of notices well before deadlines.

Auditors should verify that all mail includes a postmark. Recently, it was discovered during a customer interview that some CalFresh mail lacked a

postmark despite having a postal barcode.[52] Postmarks are crucial for customers needing to prove mail delivery after specific dates requiring action. They also help counties determine responsibility for delays between the United States Postal Service and Gainwell, the state's printing and mailing partner.

Next Steps

As we press forward in pursuit of a more dignified and accessible CalFresh experience through improved county public benefits phone systems, it is important that advocacy efforts are supported by actionable strategies. The following are suggested next steps for advocacy organizations committed to ensuring equitable access to public benefits. These steps are intended to instigate change, foster effective collaboration, and uphold the collective commitment to enhancing the lives of Californians relying on these essential services.

1. **Strategize CBO/County Partnership Opportunities:** Bring together CBOs with the most active enrollment assistance operations and those with strong county partnerships to share information and identify strategies for forging robust partnerships in more counties.

2. **Campaign for Pilot Programs:** Encourage counties to initiate pilot programs that test the feasibility and impact of recommendations, such as implementing caller ID for agency calls and Amazon Connect callback features. This practical approach allows for evaluating real-world applications and adjustments based on direct feedback.

3. **Drive Legislative Change**: Leverage the insights gained from the report to advocate for legislative changes that promote transparency and accountability in CSC operations. This may include supporting amendments to existing legislation or advocating for new bills that align with these goals.

4. **Continue Promoting Public Awareness:** Launch campaigns to raise awareness among CalFresh customers about new features and improvements in the CSC process. Advocacy organizations are ideally positioned to help disseminate this information effectively and widely.

5. **Conduct Further Research:** Identify and address knowledge gaps, particularly concerning non-English speakers, disabled individuals, and undocumented Californians. Advocacy organizations should prioritize research in these areas to advocate for more inclusive policies and practices.

[52] Valerie P. (CalFresh customer) in discussion with author, April 10, 2024.

Conclusion

County social services agencies across California are facing significant pressures. They are burdened with high caseloads as the demand for assistance grows, driven by rising inequality, economic crises, and even natural disasters. Compounding these challenges are significant staffing shortages stemming from insufficient budgets, as well as the difficulties of serving customers who may have high needs, histories of trauma, or are facing systemic barriers.

To address these issues, recommendations have been made to leverage technology, improve processes, and effectively use human resources to create resilient, long-term solutions that improve service delivery and the quality of life for those most in need. These recommendations also aim to transform the CalFresh experience into one that not only meets basic needs but also uplifts and empowers the Californians it serves. **Pursuing dignity in public benefits access is not just about enhancing system efficiency—it is about reaffirming our commitment to equity, empathy, and respect. It involves creating a system that is not only accessible but also responsive and sensitive to the diverse needs of all Californians.** Together, by embracing these recommendations, we can ensure that more interactions within the public benefits system are an affirmation of dignity, a step toward greater social justice, and a testament to our collective integrity.

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Appendix

Appendix 1: CBO Interview Guide

The Problem

Barriers within the CalSAWS phone system prevent qualified Californians from receiving the public benefits to which they are entitled in a timely and dignified manner.

The Background

As of October 30, 2023, at least 39 counties are using a newly launched contact center phone system (Amazon Connect Services) through a central contract held by the California Statewide Automated Welfare System (CalSAWS).

Community members interested in applying for public benefits can call the contact center to apply for or renew a public benefit, report changes that may impact their benefits, report issues with their benefits, or ask a question about an existing case. While many customers can manage some aspects of their public benefits online or in person, many prefer to call the county directly when there is an urgent need.

The Goal

This project is exploring the barriers that clients and CBOs face when using the phone system. The goal is to develop recommendations for minimum standards for a contact center, policy changes to support equitable access, and operational enhancements to streamline services over the phone to support increased food security, cash assistance, and access to healthcare.

CBO Questionnaire

1. Are you familiar with the CalSAWS Project and the updated Amazon Connect contact center technology? If so:

    a. When did your local county switch to CalSAWS/Amazon Connect technology?
    b. How has client experience changed (positively or negatively) since implementing the new phone system?

2. Does your organization serve a particular community or demographic group?

3. What are the unique needs of the community or demographic group you serve?

4. Are there specific groups within your service community that seem to experience more difficulties than others when navigating the CalSAWS phone system? If so, what difficulties do they experience?

5. What are your clients' most common barriers while using the CalSAWS phone system?

6. Have you experienced challenges processing intercounty transfers?

7. Does your team offer assistance by calling the county contact center via three-way calling? If so:

    a. Why is this assistance needed?
    b. What are your experiences like?
    c. Are county case workers open to your facilitation of the call?

8. Are there any additional resources or support services that clients frequently request?

9. How do challenges using the CalSAWS phone system affect your clients' lives?

10. If, by magic, you could change anything about the CalSAWS phone system, what would it be?

11. Is there anyone else in your organization who could provide more insight into the county contact center client experience?

12. Are you willing to connect us with your clients to interview them regarding their personal experiences with the CalSAWS phone system?

Appendix 2: Customer Interview Guide

The Problem

Barriers within the CalSAWS phone system prevent qualified Californians from receiving the public benefits to which they are entitled in a timely and dignified manner.

The Background

As of October 30, 2023, at least 39 counties are using a newly launched contact center phone system (Amazon Connect Services) through a central contract held by the California Statewide Automated Welfare System (CalSAWS).

Community members interested in applying for public benefits can call the contact center to apply for or renew a public benefit, report changes that may impact their benefits, report issues with their benefits, or ask a question about an existing case. While many customers can manage some aspects of their public benefits online or in person, many prefer to call the county directly when there is an urgent need.

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This project is exploring the barriers that clients and CBOs face when using the phone system. The goal is to develop recommendations for minimum standards for a contact center, policy changes to support equitable access, and operational enhancements to streamline services over the phone to support increased food security, cash assistance, and access to healthcare.

Client Questionnaire

1. Are you ok with this conversation being recorded?
2. Are you ok with your name being included in this report?
3. What county do you live in?
4. When did you first claim CalFresh benefits?
5. Did you receive help from an organization in your community with your CalFresh benefits?
6. How did you find out about the organization?
7. Have you ever had to call your county contact center for assistance with your CalFresh benefits?
8. What was the reason you had to call the county?

9. Have your benefits ever been delayed or canceled?
10. Did you have any challenges or issues navigating the phone system?
11. Were you able to navigate the system in your native language?
12. Were you offered the option to receive a callback from the county so that you did not have to wait on hold?
13. If so, did you use the callback feature?
14. If so, did you receive a callback?
15. How has the phone system negatively or positively affected your life?
16. Can you tell me about a positive experience you have had with the phone system?
17. If you could improve anything about the phone system, what would it be?



CALIFORNIA
ASSOCIATION OF
FOOD BANKS

Aging & Independence Services Advisory Council
Monday, May 12, 2025 | 12:00 p.m. – 2:00 p.m.
5560 Overland Avenue, 3rd Floor, Joaquin Anguera Room, San Diego, CA 92123

Call in: 1 (619) 343-2539
Meeting ID (access code): 224 849 240 117 | Passcode: eq7c5Wr2

COB CLERK OF THE BOARD
2025 JUN 5 AM 9:15

MINUTES - DRAFT

	Members		Absent Members	Guests
Attendance:	Paige Colburn-Hargis Faye Detsky-Weil Stephen Huber Ted Kagan Mina Kerr Shirley King Dennis Leggett Elaine Lewis Mikie Lochner Susan Mallett Silvia Martinez	Dan McNamara (joined at 12:21) David Milroy Bradlyn Mulvey Molly Nocon Maureen Phillips Taryn Patterson Jacqueline Simon (joined at 12:14) Smith Sirisakorn Wanda Smith Cristin Whittaker	Sabrina Bishop Kimberly Brown	Antoinette Alioto (virtual) Audrianna (virtual) Shelia Coulbourn Connie German-Marquez (virtual) Hannah (virtual) Karla (virtual) Charissa Japlit (virtual) Thomas Johnson Brittany Jungman Rachel Liu (virtual) Maryneeza Moraleja (virtual) Tanya Reyes-Cazarez (virtual) Amy Thompson Jorge Valerdi Andrea Villa Mr. & Mrs. Cesar B. Javier
	Staff			
	Allison Boyer Kendall Bremner Wendy Garcia Samantha Hasler Michelle Hollie-Luterick Jana Jordan	Heidi Klein Veronica Lacuesta Skyler Moore (virtual) Jennifer Sovay Brynn Viale Long		
	Outcome			
1. Call to Order	Susan Mallett, Chair, 12:04 p.m. a. Welcome & Pledge of Allegiance b. Guest/Member Introductions c. Confirmation of Quorum: ***19 present at this time.***			
2. Statement (just cause) and/or Consideration of a Request to Participate Remotely (emergency circumstances) by a Council Member, if applicable.				

3. Standard Business	a. Public Comment/Announcements: Members or non-members b. Approval of April 14, 2025, Meeting Minutes (Action)* **[M/S – S. King / B. Mulvey *(Passed with 18 votes, 1 abstained.)*]**
4. AIS Director's Items	Highlights included: • May is Older Americans Month as well as Older Californians Month. The theme for 2025 is Flip the Script on Aging. • American Society on Aging's On Aging 2025: • Last month, some of our AIS team attended the American Society on Aging's On Aging 2025 Conference in Orlando. AIS was chosen to present on several topics including: Leveraging Electronic Health Records to Improve Dementia Detection and Care, Expanding Options for Veterans Through Veterans Directed Care, 100 Miles: Outcomes from a No-Cost Transportation program for Older Adults, Wisdom of the Ages: Lessons from 20 Years of Intergenerational Programming, and Tech2Connect: Tackling Social Isolation and Creating Connections. • The County's recommended budget for the next fiscal year was released on May 1, 2025. Acknowledging that our communities are facing uncertain times with increasing needs throughout our region, the budget demonstrates the County's strong commitment to serving its residents. • Board Letter: IHSS Public Authority Fiscal Year 2025-2026 Recommended Budget (Informational Item Only)* • The June 24, 2025 Board Letter to formally adopt the Fiscal Year 2025-2026 Administrative Budget for the In-Home Supportive Services Public Authority is included in your agenda packet as an informational item. This item was also presented to the In-Home Supportive Services/Public Authority Advisory Committee for their review on May 9, 2025.
5. Guest Speakers	a. Fiscal Year 2025-2026 CAO Recommended Budget: Agency Budget Office *Amy Thompson, Executive Finance Director* Highlights included: • Agenda • Unemployment • Inflation • Statewide Sales Tax • Upcoming Budget: State Budget • Upcoming Budget: Federal Uncertainty • Upcoming Budget: County • HHSA: Budget Strategy • HHSA FY 2025-26 Recommended Budget by Department: $3.5 billion • FY 2025-26 CAO Recommended Budget • HHSA FY 2025-26 FTE Change • A Look Back: 5 Year Trend • HHSA Key Increases & Continued Investments • Upcoming Budget Events: Key Dates • Closing Remarks And Q&A b. Aging & Independence Services, Multipurpose Senior Services Program (MSSP) Update *Heidi Klein, Aging Program Specialist III* *Veronica Lacuesta, Aging Program Specialist III* Highlights included: • Overall Goal of MSSP • Eligibility • Program Statistics • Core Components: Care Management and Service Arrangements • MSSP Team • Service Agreement

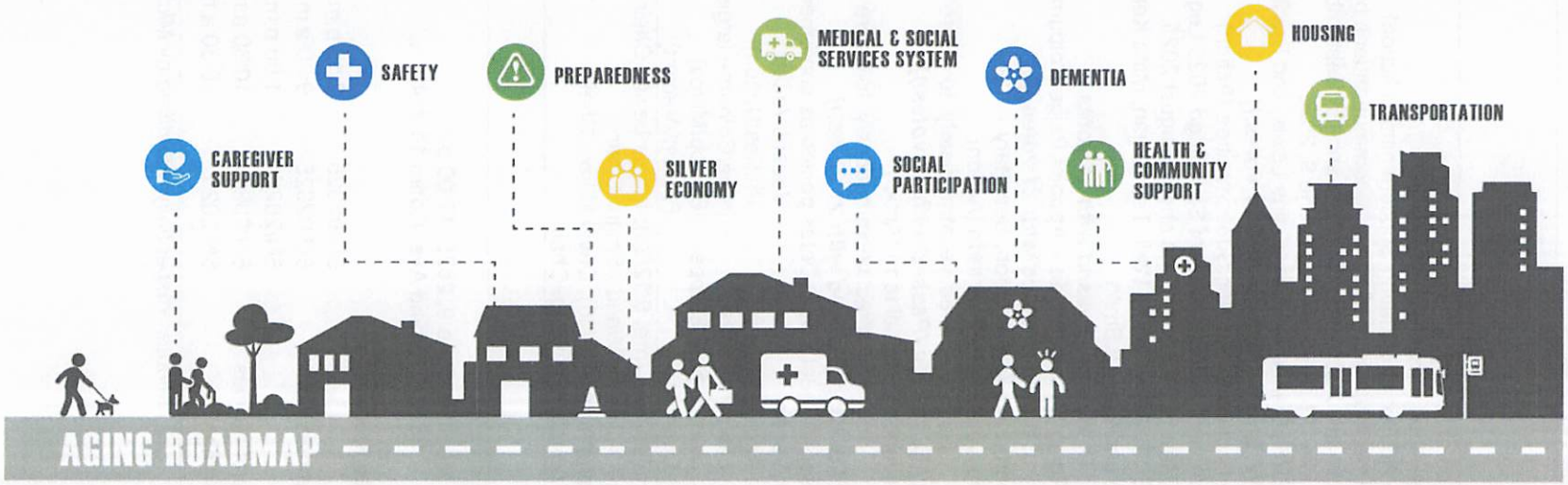
	• Maria's Hobby • Robert's Story • Questions
6. Executive & Membership Subcommittee Report/Other Business	a. Chair's Report: Susan Mallett, Chair i. Subcommittee Appointments and Updates a) Convene Ad Hoc Nominating Subcommittee (Action) - ROLE: Prepare a slate of officer recommendations by June 2025 for the officer elections in July 2025 and officer swearing in September 2025. - TERM: May 12, 2025, through June 9, 2025. - MEMBERS: Stephen Huber, Elaine Lewis, and Bradlyn Mulvey. **[M/S – S. King / W. Smith *(Passed with 21 votes.)]*** b) Convene Legislative Ad Hoc Subcommittee (Action) - ROLE: Advise on the County of San Diego 2026 Legislative Program. - TERM: May 12, 2025, through end of August 2025. - MEMBERS: Faye Detsky-Weil, Ted Kagan, Mina Kerr, Elaine Lewis, Silvia Martinez, and Wanda Smith. **[M/S – T. Kagan / B. Mulvey *(Passed with 21 votes.)]*** c) Healthy Aging Subcommittee – Appoint Paige Colburn-Hargis (Action) **[M/S – W. Smith / J. Simon *(Passed with 21 votes.)]*** b. Membership Report: Jacqueline Simon, Secretary i. Appoint Shelia Coulbourn to full term (Action) - Seat #28, effective immediately, to expire 9/28/2028 **[M/S – S. Mallett / B. Mulvey *(Passed with 21 votes.)]*** ii. Appoint Rhys Jones to partial term (Action) - Seat #19, effective immediately, to expire 10/13/2026 **[M/S – S. Mallett / S. King *(Passed with 21 votes.)]*** c. Board of Supervisors Annual Visits (Dates posted as confirmed): i. District #1: Vacant [Vacant/Vacant] ii. District #2: Anderson [Phillips/Nocon] 2/26/2025 iii. District #3: Lawson-Remer [King/Colburn-Hargis] 1/31/2025 iv. District #4: Montgomery Steppe [Bishop/Milroy] 10/11/2024 v. District #5: Desmond [Vacant/Vacant]
7. Ancillary Subcommittee Oral Reports	a. LTC Ombudsman/Facilities (met 5/12/25): Elaine Lewis, Chair b. Healthy Aging (met 4/14/25): Wanda Smith, Chair c. Affordability in Aging (met 5/12/25): David Milroy, Chair d. Nutrition (met 5/7/25): Shirley King, Chair
8. Other Announcements	
9. Adjournment & Next Meeting	Meeting adjourned: 2:00 p.m. Next Council Meeting: June 9, 2025, 12:00 p.m. 5530 Overland Ave. Room 141/142 **Future Subcommittee Meetings:** ➢ Healthy Aging: 5/12/2025 2:15 p.m. ➢ Executive & Membership: 5/21/2025 9:00 a.m. ➢ Nutrition: 6/4/2025 1:00 p.m. ➢ LTC Ombudsman/Facilities: 6/9/2025 10:30 a.m. ➢ Affordability in Aging: 6/9/2025 10:30 a.m.

Minutes respectfully submitted by Michelle Hollie-Luterick.

AGING & INDEPENDENCE SERVICES (AIS) ADVISORY COUNCIL | GOALS 2024 – 2027

COUNCIL FOCUS: Use or gain expertise to identify, project, and anticipate needs and trends, and advise on AIS operational actions to address the needs of older adults and persons with disabilities.

AGING ROADMAP: County of San Diego's regional plan that is implemented and organized by 10 focus areas that collectively represent the County's comprehensive system of care, including both person-centered and community-wide efforts. Roadmap focus areas are as follows and identified throughout the Council's Goals:



GOALS 2024 – 2027

#	Goal	Timeline	Lead	Measure	Outcome	Status
1	Advise on the 4-year Area Plan for FY 2024-2028.	Feb – May 2024	Ad Hoc Area Plan Subcommittee	• Meeting date(s) • Discussion • Vote and authorization of Council Chair to sign letter of transmittal	• Ad Hoc Area Plan Subcommittee met on 2/12/24 and 3/8/24. • Area Plan public hearing comment and consideration of acceptance during Advisory Council meeting on 3/11/24. • Discussion included: Area Plan 2024-2028 updates and process and content of the Area Plan. The Ad Hoc Subcommittee recommends continued consultation, input, and monitoring of progress from Advisory Council. Authorization passed with 18 votes on 3/11/24.	Completed

AGING & INDEPENDENCE SERVICES (AIS) ADVISORY COUNCIL | GOALS 2024 – 2027

1a	Advise on Area Plan updates for FY 2024-2025.	Feb – May 2025	Ad Hoc Area Plan Subcommittee	• Meeting date(s) • Discussion • Vote and authorization of Council Chair to sign letter of transmittal	• Discussion included:	Not yet started
2	Monitor and plan for the expansion of services for older adults to meet the needs of the growing population.	Ongoing	Ad Hoc Area Plan Subcommittee and Advisory Council	• Discussion	• Discussion included:	In progress
3	Find engaging speakers for the AIS Advisory Council general meetings.	Ongoing	Advisory Council	• Speakers	• Speakers' topics included:	In progress
4	Expand participation in appropriate Auxiliary Subcommittees.	Ongoing	Advisory Council	• Meeting date(s) • Discussion	• Auxiliary Subcommittee met on: • Discussion included: • Authorization passed:	In progress
5	Participate in appropriate Ancillary Subcommittees.	Ongoing	Advisory Council	• Meeting date(s) • Discussion	• Ancillary Subcommittee met on: • Discussion included: • Authorization passed:	In progress
6	Research and make recommendations for priority areas to support economic security amongst older adults in San Diego.	2024-25 Council Year	Affordability in Aging Subcommittee	• Finding(s)	• Topics included: • Recommendations:	Not yet started

AGING & INDEPENDENCE SERVICES (AIS) ADVISORY COUNCIL | GOALS 2024 – 2027

7	Research and make recommendations for priority areas of healthcare programs and groups for older adults. 	Ongoing	Healthy Aging Subcommittee	• Finding(s)	• Topics may include, but are not limited to, where the older adult population meets, nutrition, socialization, geography/communities, disabilities, mental health, neurodegenerative diseases of AD, PD, FTD, Dementia, ways to increase awareness and education in hospitals re: geriatric issues.	In progress
7a	Research the impacts of isolation and explore the "Seniors Who Live Alone" topic. 	Ongoing	Healthy Aging Subcommittee	• Finding(s)	• Discussion included:	In progress
8	Review how older adults who have the greatest economic or social need are made aware of and utilize nutrition services including CalFresh benefits. 	Ongoing	Nutrition Subcommittee	• Finding(s)	• Topics may include review of nutrition resources and education through the AIS website, printed materials. • Examine the barriers to CalFresh benefit enrollment and how enrollment assistance is promoted.	In progress
9	Review the research and implementation efforts of local and national 'food as medicine' initiatives that focus on the integration of food for disease prevention and management. 	Ongoing	Nutrition Subcommittee	• Finding(s)	• Topics may include, but not limited to enhancing nutritional quality through increased fruit and vegetable consumption and the importance of good nutrition for older adults living with chronic health conditions.	In progress
10	Increase awareness about good oral health and dental treatment options through public insurance benefits. 	Ongoing	Nutrition Subcommittee	• Finding(s)	• Discussion included:	In progress
11	Identify disease risk reduction strategies and educational opportunities	Ongoing	Healthy Aging Subcommittee	• Finding(s)	• Topics may include cardiac health, diabetes, oral health care and nutrition, dementia and neuro-degenerative disorders and Parkinson's disease.	In progress

AGING & INDEPENDENCE SERVICES (AIS) ADVISORY COUNCIL | GOALS 2024 – 2027

	for diseases and disorders affecting older adults.					
12	Monitor and advise on AIS programs through presentations and site visits.	Ongoing	Nutrition Subcommittee Healthy Aging Subcommittee	• Meeting(s) and date(s) attended	• Discussion included:	In progress
12a	Congregate Meals (Title III C1) and Transportation to Dining Sites (Title III B). Review nutrition education and in-service requirements for congregate sites.	Ongoing	Nutrition Subcommittee	• Meeting(s) and date(s) attended	• Discussion included:	In progress
12b	Home-Delivered Meals (Title III C2)	Ongoing	Nutrition Subcommittee	• Meeting(s) and date(s) attended	• Discussion included:	In progress
12c	SNAP-Ed (Cal Fresh)	Ongoing	Nutrition Subcommittee	• Meeting(s) and date(s) attended	• Discussion included:	In progress
12d	Older Adult Health Promotion (Feeling Fit, Fall Prevention, etc.) and Healthy Aging in life-long learning.	Ongoing	Healthy Aging Subcommittee	• Meeting(s) and date(s) attended	• Awareness and Promotion of local programs in lifelong learning to support Healthy Aging.	In progress
13	Monitor pending legislation in all goal areas and participate with respective committees and AIS staff in analysis of legislation.	Ongoing	Advisory Council and Ad Hoc Legislative Subcommittee	• Legislation monitored	• Discussion included: • Recommendations:	In progress
14	Monitor and make	Ongoing	Long Term Care	• Date(s) of Choose Well	• Recommendations for improvement, including assessment	In progress

AGING & INDEPENDENCE SERVICES (AIS) ADVISORY COUNCIL | GOALS 2024 – 2027

	recommendations for enhancements to Choose Well. 		& Ombudsman Facilities	meeting(s) attended • Quarterly meetings.	of effectiveness or additional resources needed. • Discussion included:	
15	Advise AIS on legislation proposals and changes related to Skilled Nursing Facilities and Residential Care Facilities for the Elderly. 	Ongoing	Long Term Care & Ombudsman Facilites	• Legislation Monitored	• Raise and maintain awareness for the AIS Advisory council surrounding legislation related to skilled nursing facilities and residential care facilities for the elderly. • Discussion included:	In progress
16	Monitor and advise AIS on the Ombudsman program standard of operations, goals, performance, and increasing the number of volunteers as well as advise on areas of concern related to long term care. 	Ongoing	Long Term Care & Ombudsman Facilities	• Meeting(s) and date(s) attended	• Recommendations for improvement, including assessment of effectiveness or additional resources needed. • Discussion included:	In progress
17	Monitor and advise on success of existing technology programs and promote access to and utilization of technology. 	Ongoing	Advisory Council and All Subcommittees	• Finding(s) • Number and topic of media campaign	• Recommendations may include a media campaign to promote existing programs or identify opportunities for new programs.	Not yet started

COSD CLERK OF THE BOARD
2025 MAY 28 AM9:23

Jess Martin Park Advisory Committee

Meeting Minutes – April 7, 2025

Location: San Diego County Library, Julian, CA

Time: 4:00 p.m.

- Members Present:
  - Richard Loomis
  - Mike Charlonne – Chair
  - Allisun Kraemer
  - Carmen Longoria (Call-In)
- Also Present:
  - Representing the County of San Diego Department of Parks and Recreation:
  - - Carlos Henosa, Supervisor for William Heise and Jess Martin Parks
  - - Ruben Maza, Park Ranger
- Community Member Guests:
  - - None
- Members Absent:
  - - None

Call to Order

The Chairperson called the meeting to order at 4:04 p.m. A quorum was present.

Approval of Agenda

The agenda was approved.

Announcements and Introductions

None

Public Comments

No public comments were received.

Approval of February 2025 Meeting Minutes

The minutes from the February meeting were approved as presented.

Old Business - Park Update

• Little League has started on the fields; overseeding completed.
• Pit toilets were pumped.
• Storm water inspection passed with no issues.
• Little League has a snack trailer with hot and cold water and a valid food handler's card.
• Little League requested permission to hook up the trailer to the electrical box between the fields; the box requires repair.
• Parks staff will inspect the electrical box.
• Committee discussed possibility of installing a 50-amp outlet to reduce reliance on generators. Mike Charlonne volunteered to donate necessary parts.
• Little League season concludes June 7. No tournaments planned post-season, but practices may continue through early August.
• Park improvement project scope being developed with current budget of $200,000. Project manager conducted a walk-through and will try to incorporate board suggestions. An updated scope should be available by the next meeting.
• Mike Charlonne suggested exploring TOT (Transient Occupancy Tax) funds for additional park support. Richard Loomis will add this to future agendas.

Monthly Park Maintenance Fund Budget Update

• Current maintenance budget stands at $26,646. However, additional staffing costs and significant items such as septic service and state fees for the small water system are still pending.
• Clay is needed for pitcher's mounds and batter's boxes. Carlos will confirm with the fiscal team that expenditures remain within budget. Mike will send pricing information for the clay to Carlos.

Wellhead Tank and Landscape Tie-In Update

• Parks is holding biweekly meetings with the new project manager to review potable water, water tank, and landscape integration.
• Carlos may invite Luke, the project manager, to attend an upcoming JMPAC meeting to provide updates directly.

Basketball Half-Court

• Per Carlos, still on track to collect required signatures by April 23rd.

Proposed Next Meeting Date and Location

• The next meeting is scheduled for Monday, June 2nd, 2025, at 4:00 p.m. at the Julian County Library.
•

Adjournment

The meeting was adjourned at 4:25 p.m.

Committee Details

† JMPAC: Jess Martin Park Advisory Committee

‡ DPR: San Diego County Department of Parks and Recreation

The Jess Martin Park Advisory Committee is a voluntary organization chartered to provide community input and recommendations to the Director of the County's Department of Parks and Recreation on issues related to the budget, maintenance, operations, park development, facilities, and recreation programs for Jess Martin Park (Landscape Maintenance District Zone No. 2 - Julian).

- Current Members:
  - Mike Charlonne – Chairperson
  - Allisun Kraemer – Vice Chairperson
  - Richard Loomis – Secretary
  - Carmen Longoria – Board Member
- Contact Person:
  - Mike Charlonne, Chairperson
  - Email: mlcharlonne@yahoo.com

PARKS ADVISORY COMMITTEE

COSD CLERK OF THE BOARD
2025 JUN 4 PM4:03

April 11th, 2025

Members Present	Members Absent	Staff Present	Public Present
In-Person Doug Goad, Chair, District 3 Jeffry Jones, District 2 Nicole Honstead, District 2 Rob Hutsel, Vice-Chair, District 3 Susan Hector, District 4 Paul Davis, District 5	Susie Murphy, District 1 Jonathan Kimble, District 4	Jason Hemmens Vanessa Madera Crystal Benham Bethany Principe	Sabrina SDSU Student Mary Hodson (Virtual)

MEETING MINUTES

1. Call to Order – 9:03 am

2. REMOTE PARTICIPATION DISCLOSURE
   - None

3. OPPORTUNITY FOR MEMBERS OF THE PUBLIC TO SPEAK
   - None

4. APPROVAL OF THE MEETING MINUTES
   - MOTION TO APPROVE THE MARCH 14, 2025, MEETING MINUTES – Committee Member Davis, 2nd Committee Member Hector.
     ALL IN FAVOR – 6-0-0

5. COMMITTEE MEMBER COMMENTS ON ANY ITEM NOT ON TODAY'S AGENDA
   - Committee members introduced themselves to new member Jeffry Jones.
   - Committee member Davis shared his concerns about the fires in Pacific Palisades and informed the committee about the statewide convention on fire preparedness that will be hosted by the Director of his community.
   - Committee member Hutsel shared the information on the River Days event, including dates and available activities. More details can be found at Sdriverdays.org
   - Committee member Goad informed the committee that he delivered the letter to the Clerk of the Board.

6. DEPARTMENT REPORT
   Jason Hemmens, Director, presented the department report, which included updates on the following items related to Parks:
   - Informed PAC members about the Budget Updates and related meetings:
     - 4/17 Budget Open House at COC Chambers
     - 5/1 Budget will be release to the public
     - 5/22 Proposed Budget Community Meeting
     - June – Virtual Proposed Budget Community Meeting

- Informed committee members of the new land acquisition of Star B Ranch in Santa Ysabel, adding 540 Acres to Santa Ysabel on the western side.
- 4/23: Board Letter will be submitted to advertise the construction of basketball court at Jess Martin County Park in Julian.

7. DPR PRESENTATIONS
   - MSCP ANNUAL REPORT – Crystal Benham, Resource Management Division Chief, and Bethany Principe, MSCP Program Coordinator, gave a presentation focusing on the South County Subarea of the MSCP. They discussed land acquisitions over the past 27 years, explained how some areas are classified as part of the South area based on biological criteria, and provided updates on management, monitoring activities, recent accomplishments, and current projects.

8. ADJOURNMENT – 10:08 am
   - Future agenda items: Parks Society.

   - MOTION TO ADJOURN - Committee Member Honstead, 2nd Committee Member Hutsel.
     ALL IN FAVOR – 6-0-0

COSD CLERK OF THE BOARD
2025 JUN 2 PM12:58

SAN DIEGO COUNTY
COMMISSION ON THE STATUS OF
WOMEN & GIRLS

1600 Pacific Highway, Room 201
San Diego, CA 92101-2942
www.sdstatusofwomenandgirls.org
CSWG@sdcounty.ca.gov

Chairwoman: Kristine Custodio Suero

Vice Chair	**District 1, Vargas**	**District 2, Anderson**	**District 3, Lawson-Remer**
Vernita Gutierrez	Vacant	Mary Davis	Kimberly Keen
Vacant	Monica Martinez	Lauren Welty	Kristine Custodio Suero
Idara Ogunsaju			

District 4, Montgomery Steppe	**District 5, Desmond**	**Members At Large**	**Staff Assistant**
Idara Ogunsaju	Rohida Khan	Kelly Jenkins-Pultz	Cristina Garcia
Vacant	Amy Nantkes	Vernita Gutierrez	**Senior Deputy County Counsel**
		Vacant	Heather Murray

MINUTES
May 2, 2025
Hybrid Meeting
12:00 PM – 1:00 PM

Chair Kristine Custodio Suero: Meeting was called to order at 12:08 PM.

Agenda item #1 – Commissioner Roll Call:

Members Present In-person:

Kristine Custodio Suero	Vernita Gutierrez
Idara Ogunsaju	Amy Nantkes
Monica Martinez	Rohida Khan – Attended remotely due to just cause
Mary Davis	Kelly Jenkins-Plutz
Kimberly Keen	

Members Absent:

Lauren Welty	

After roll call, Senior Deputy County Counsel Murray suggested to move agenda item #8, nominations and election of the vacant Vice Chair position on the executive board and Chair of the Civic engagement Committee to be the first agenda item heard. Therefore, the listing of agenda items below reflects the order in which the agenda item was heard during the meeting.

(New Business) Agenda item #8 – Nominations and election of vacant Vice Chair position on the executive board and Chair of the Civic Engagement Committee: Chair Custodio Suero asked if Comm. Khan was still interested in self-nominating for open position since she previously expressed interest. Comm. Khan did not respond therefore Chair Custodio Suero moved forward with other nominations. Commissioner (Comm.) Kelly Jenkins-Pultz self-nominated for the vacant vice chair position and chair of the Civic Engagement Committee. Comm. Nantkes made a motion to approve the nomination. Vice Chair (VC) Ogunsaju seconded the motion. All those present voted in favor of the motion. Motion carried.

(New Business) Agenda item #9 – Adopt a resolution urging transparency in CEDAW implementation: Chair Custodio Suero asked to hear a motion on the floor to adopt a resolution urging transparency in CEDAW implementation. Senior Deputy County Counsel Murray mentioned there were several inaccuracies in quotations in law and contract and mis-situation to law, so the option is for the board to adopt a resolution in substance and counsel and chair can meet after to fix the items before the resolution is signed. Chair opened the floor to entertain a motion to adopt the resolution in substance. VC Ogunsaju made a motion. Comm. Nantkes seconded the motion. Chair Custodio Suero read written public comment from former chair Jenni Prisk (Attachment A). Chair Custodio Suero read written public comment from Mary Hansel (Attachment B). Former chair Melinda Vasquez, who attended virtually, provided her support for the resolution during public comment. Rosemary Straley of League of Women Voters, who attended virtually, also provided her support for the resolution during public comment and willing to provide a written statement. Chair Custodio Suero read written public comment submitted Ashley Raveche, President of United Nations Association, USA, San Francisco (Attachment C). Former chair Parisa Ijadi-Maghsoodi, who attended virtually, provided her public comment in support of the resolution. No further public comment. A roll call vote was held with all commissioners voting in favor. Motion carried.

Agenda item #2 – Approval of Minutes for the April 4, 2025 Regular Meeting:

Commissioner (Comm.) Nantkes made a motion to approve the April 4, 2025, regular meeting minutes. Comm. Davis seconded the motion. All those present during the meeting voted in favor of the motion except Comm. Davis and Keen who abstained due to being absent for the April 4th meeting. Motion carried.

Agenda item #3 – Approval of Minutes for the December 6, 2025 Strategic Planning Meeting:

Commissioner (Comm.) Nantkes made a motion to approve the April 4, 2025, regular meeting minutes. Vice Chair Gutierrez seconded the motion. All those present during the meeting voted in favor of the motion except Comm. Martinez, Comm. Keen and VC Jenkins-Pultz, who abstained since they were not commissioners at the time of the December 6th Strategic Planning meeting. Motion passed.

Agenda item #4 – Public Comments:

None

Agenda item #5 – Committee Reports:

a. Civic Engagement: Chair Custodio Suero has been engaging in community engagement and community outreach as a commissioner and private citizen. She attended the State of the County on April 16, 2025. She was invited to the California Western School of Law, Women and Immigration Law class on April 22, 2025. Then on April 23, 2025 was invited to SDSU undergraduate women's study student Women Law and Policy class. Then earlier this week she had a meeting with Chair Susan Davis from the City of San Diego Commission on the Status of Women. Comm. Davis attended the Lemon Grove democratic club on March 26th where she advertised and promoted CEDAW, and the club was very excited about it.
b. Policy: Meeting May 9th.
c. Governance: VC Gutierrez shared that the committee met on April 4th and the intent was to review the draft of operating procedures but that document was not ready for review so they will review it at the next committee meeting.
d. Executive Board: No updates but discussed briefly appointments and vacancies which is also on the agenda for today's meeting.

Old Business:

Agenda item #6 – Initiative Updates and Liaison Reports

a. CEDAW Advisor: CEDAW advisor, Parisa Ijadi-Maghsoodi was not online at the time to provide any updates but rejoined after item #10. Two updates 1) status on request for confirmation – no update to the status. 2) national convening – In end of May or early June, there will be a national convening of CEDAW representatives from jurisdiction across the nation to share best practices and implementation to highlight progress. SD will be spotlighted because of the tremendous ordinance along with LA. Hoping to have Comm. Nantkes provide a presentation similar to the presentation she provided to the commission in December 2024. Also inviting elected officials and county staff implementing CEDAW ordinance. Mentioned it to the San Diego County Office of Equity and Racial Justice and hoping they attend. The meeting will be virtual to ensure accessibility. The issue is timing because of the folks on the east coast. It potentially will be held on a weekday in the afternoon, but possibly a Saturday. Mary Hansel is the individual leading this convening.
b. Women's Hall of Fame: Chair Custodio Suero mentioned there was a meeting was scheduled for May 1st but was cancelled. Women's Hall of Fame scheduled to take place in November but not actual date set.

c. Association of California Commissions for Women: No updates as Comm. Welty was not present and did not submit any updates to the Chair or Staff Assistant.

Agenda item #7 – Discussion and update regarding appointments and vacancies: Chair Custodio Suero welcomed new commissioner Kelly Keen. Comm. Keen provide information about herself and her passion for the commissions work. Comm. Kelly Jenkins-Pultz, now Vice Chair, also provided information about herself and her passion for continuing to work with the commission in her new role as Vice Chair. Chair Custodio Suero shared there is a vacancy in District 1, District 4 and an At-Large vacancy. Comm. Nantkes would like to consider on going work with youth and young women and consider filling the at-large seat with a younger woman to allow for younger voice, input, and knowledge. VC Gutierrez mentioned it would be a good idea to reach out to the applicants that applied a while ago to ask if they are still interested in serving on the commission and make sure they were applying of the correct commission since there was an application received that had a different commission name. Comm. Davis strongly encourages youth participation but mentioned that there should not be a rubric put in writing stating preferential treatment to the youth as not to age discriminate because over 40 is a protected class. Comm. Nantkes wanted to put on the forefront of giving younger women an open opportunity. Former chair Vasquez provided her public comment that the at-large position is meant to fill in where a characteristic is missing and that Comm. Nantkes was trying to convey that the commission is lacking youth. The Civic Engagement Committee to look at applications received and provide recommendations to the commission of who to nominate for the vacant seats and there would be further discussion of the recommendations.

Agenda item #10 – Roundtable: Initially no information was shared but after CEDAW advisor shared the CEDAW updates, Chair Custodio Suero shared she has a meeting with the Office of Equity and Racial Justice on May 7th for a formal meet and greet. Also, on May 9th the City of San Diego Commission on the Status of Women will be holding their meeting in Balboa Park. There will be a guest speaker for the June 6th meeting.

Adjourn

Agenda item #11: This meeting is closed at 1:08 p.m.

Information Items:

- **2025 Meetings:** June 6th, July 11th, August 1st, September 5th, October 3rd, November 7th, December 5th

NOTE: The Commission on the Status of Women and Girls jurisdiction is established by action of the Board of Supervisors as follows: The Board of Supervisors of the County of San Diego declares that it is the policy of the County to take action to identify needs and problems of women in the County that are affected by public policy decisions; and furthermore, to eliminate the practice of discrimination and prejudice on the basis of sex within the County. In order to promote this policy and to provide an open forum for discussion and action, there is hereby established a San Diego County Commission on the Status of Women in the Chief Administrative Office. County Code of Administrative Ordinances, Section 85.

Agenda Item #9 – Written Public Comments submitted

ATTACHMENT A

The CEDAW Ordinance has never been more important in our country than right now. Women especially are seeing removal of their rights and justice. Therefore the CEDAW adoption is vital to progress the rights of women and girls. I strongly recommend that the San Diego County Commissioners on the Status of Women & Girls pass, on May 2, 2025, the resolution urging transparency in the implementation of the CEDAW Ordinance. It is imperative that the County provide confirmation that the baseline data analysis will cover all units, programs and services – especially those for women in poverty – thus focusing on inequities in County operations.

Over many years a dedicated team of Commissioners have fought tirelessly for the adoption of the CEDAW Ordinance. These efforts must not be wasted. The current Commission has the opportunity at this moment in time to apply its strength and commitment to the County's understanding that the baseline data analysis must be implemented without prejudice and with full compliance with the intent and purpose of the Ordinance.

Thank you.

Jenni Prisk

Former Chair of the SDCCSW, 2015-2017

Agenda Item #9 – Written Public Comments submitted

ATTACHMENT B

I offer this public comment in support of the resolution promoting transparency in the implementation of San Diego County's CEDAW ordinance.

I am an international human rights attorney and legal scholar. Although I submit this comment in my personal capacity, I serve as Co-Chair of the National Cities for CEDAW Advisory Board and Co-Founder of CEDAW Rising — a new organization leading the next chapter of local CEDAW implementation. I was the lead advocate for Los Angeles County's CEDAW ordinance and provided technical assistance in support of San Diego's measure. Last month, I was honored to receive L.A. County's inaugural Human Rights Award for my CEDAW-related work.

In May 2024, Cities for CEDAW sent the attached letter to the San Diego Board of Supervisors and the Office of Equity and Racial Justice, offering guidance on effective implementation of the CEDAW ordinance. This letter emphasized the critical need for gender analyses to include all jurisdictional units, programs and services. Indeed, comprehensive gender analyses enable jurisdictions to identify intersectional gender inequities and lay the foundation for meaningful progress.

The inclusion of all jurisdictional functions is not only practical — it is essential to governmental transparency. Transparency is a cornerstone of human rights, as well as a catalyst for developing impactful action plans for gender equity.

San Diego has made important strides, and I applaud your commitment and leadership to date. To ensure full compliance with the intent and purpose of the ordinance, however, it is vital to confirm that the baseline gender analysis will encompass all County units, programs, and services. Adoption of this resolution will affirm your commitment to transparency, reinforce the integrity of your CEDAW implementation and set a national example for advancing structural gender equity.

Mary Hansel, J.D., LL.M
Co-Founder, CEDAW Rising
Co-Chair, National Cities for CEDAW Advisory Board

Agenda Item #9 – Written Public Comments submitted

ATTACHMENT C

Dear Chair Kristine Custodio Suero and Supervisors Lawson-Remer and Montgomery-Steppe,

Please find a letter of support for the Commission on the Status of Women and Girls Agenda item #9 Resolution Urging Transparency in CEDAW implementation, submitted on behalf of the United Nations Association, USA, San Francisco Chapter, and the Ratify Movement.

For your additional review, I have also included a letter submitted in June 2024 addressing past concerns regarding the benchmark gender-data collection mandated by San Diego's CEDAW ordinance.

I am available for any questions you may have.

In kindness and respect,

--

Ashley Raveche

President

United Nations Association, USA, San Francisco

president@una-sf.org

UNITED NATIONS ASSOCIATION
OF THE UNITED STATES OF AMERICA
San Francisco Chapter

May 2, 2025

Commission on the Status of Women and Girls
Chair, Kristine Custodio Suero
1600 Pacific Highway, Room 201
San Diego, CA 92101

Via email: CSWG@sdcounty.ca.gov,

Re: Letter in Support of the Adoption of the Resolution Urging Transparency in CEDAW Implementation [Agenda Item 9, May 2, 2025]

Dear Chair Custodio Suero and Commissioners,

On behalf of the United Nations Association, USA, San Francisco and convenor of the Ratify Movement, we provide this letter in strong support of the **Resolution Urging Transparency in CEDAW Implementation.**

As one of the community stakeholders who helped to create San Diego's CEDAW Ordinance No. 10791, adopted in May 2022 , we have continued to monitor the implementation progress and have provided thoughtful feedback to support the critical aspects of disaggregated gender-data collection to ensure the most successful outcomes for the County's strategic approach to addressing an end to all forms of discrimination against women and girls. The UNA-San Francisco provides this support guidance sharing best practices on benchmark gender-data collection and highlights the shared goals from a global human rights framework.

The CEDAW ordinance requires a baseline intersectional gender analysis, which will inform the Intersectional Gender Equity Action Plan, to be developed by every County operational unit. And this output cannot be achieved unless the totality of the operational data includes all units, departments, and services in the gender-data

collection and benchmark analysis. Moreover, the stated goal of ending discrimination to address gender-based violence, poverty and homelessness of women is diluted if the County omits the largest housing programs which disproportionately serves extremely low-income women, and women of color for the baseline data collection. Lastly, we urge the County to prioritize data collection that focuses on inequalities in County operations, rather than publicly available demographic data as the objective benchmark metric to analyze its results.

Transparency in the benchmark gender-data collection and clear metrics for its analysis is integral to effective implementation of the CEDAW framework. The County's adopted approach of a comprehensive review of systems of discrimination are undermined if the data-collection is not transparent or is failing to collect the benchmark data prioritized in the ordinance specific for the analysis of the impacts of women and girls housing insecurity, growing conditions of poverty, and increased incidents of gender-based violence in the County.

The gender data is intended to facilitate closing policy gaps that have stalled progress of women's ability to advance the economy and participate fully, therefore it is imperative that San Diego County effectively collect the necessary benchmark gender-data to influence policy decisions impacting poverty, housing, and violence prevention. Moreover, the benchmark gender-data will serve as a valuable metric to review future progress of each County department, agency, and unit in order to correlate county-wide strategic goals from the analysis and results in its Gender Equity Action Plan.

San Diego County has adopted a powerful tool to effect more equitable outcomes for women and girls, to improve government operations, and to measure the impact of direct and indirect services. Building the CEDAW ordinance into operations and performance indicators of each department, agency, and unit is the best practice for using taxpayer monies to effectively address existing and systemic disparities, while closing the gender inequalities in San Diego.

UNITED NATIONS ASSOCIATION
OF THE UNITED STATES OF AMERICA

San Francisco Chapter

The baseline data collection is the comprehensive strategy to achieve the shared goals of the San Diego Board of Supervisors and the Commission on the Status of Women and Girls. Solving such intersectional problems of systemic discrimination requires not only addressing the root causes of failures within a particular system but also working across all County-wide systems to address intersecting and compounding issues.

San Diego's CEDAW ordinance has the potential to accelerate gender justice in economic development, the criminal legal system, voting rights, civic engagement, health care, as well as act as a barrier to gender-based violence and harassment, poverty and a bridge to address housing and homelessness. I am encouraged by this Resolution that seeks transparency in the process to support the most effective implementation of the San Diego CEDAW ordinance. Thank you for your time, and commitment to eliminating all forms of discrimination against women and girls through data-driven analysis and action-informing insights.

Ashley Raveche
President
United Nations Association, USA, San Francisco
Ratify Movement
870 Market Street, #969
San Francisco, California 94102
president@una-sf.org
www.una-sf.org | main (415) 580-2465

CC:
Terra.Lawson-Remer@sdcounty.ca.gov; Monica.MontgomerySteppe@sdcounty.ca.gov;

UNITED NATIONS ASSOCIATION
OF THE UNITED STATES OF AMERICA
San Francisco Chapter

June 7, 2024

Director Strong
Program Manager LeRoy
Office of Equity and Racial Justice
County Administration Center
1600 Pacific Highway
San Diego, CA 92101

Via email Andrew.Strong@sdcounty.ca.gov; Chiara.Leroy@sdcounty.ca.gov;

Re: June 7, 2024 Commission on the Status of Women and Girls, Resolution Urging the County to Provide Operational Data for a Baseline Analysis

Dear Director Strong and Program Manager LeRoy:

On behalf of the United Nations Association, USA, San Francisco and convenor of the Ratify Movement, we provide this letter in support of the Commission on the Status of Women and Girls' adopted Resolution Urging the County to Provide Operational Data for a Baseline Analysis.

As one of the community stakeholders who helped to create San Diego's CEDAW Ordinance, I know how critical the gender-data collection is to effective implementation of the CEDAW framework. The County can only view systems of discrimination in its local operations, policies, and external services through the disaggregated data. It is further important to highlight that the data collected also represents millions of dollars in public funds for programs and services that address inequalities and discrimination, and a review of this impact is a critical, fiduciary responsibility of the Board and all Department Directors.

The County adopted ordinance No. 10791 in May 2022 declaring the following as its direct motivation for the gender-based data collection and analysis:

> WHEREAS, multiple forms of discrimination compound to disadvantage and oppress women, including race, ethnicity, immigration status, disability, familial status, and age. The extent to which women and girls experience inequities impact their overall wellbeing and economic stability; and
>
> WHEREAS, adoption of a CEDAW ordinance at the county level will help achieve gender equity and remove barriers faced by women and girls within the county, including in the areas of economic development, the criminal legal system, voting rights, civic engagement, health care, gender-based violence and harassment, housing and homelessness;

Moreover, the ordinance requires an intersectional gender analysis, which will inform the Intersectional Gender Equity Action Plans to be developed by every County operational unit. And this output cannot be achieved unless the disaggregated gender-based data is prioritized in its collection and analysis.

The stated goal of ending discrimination to address gender-based violence, poverty and homelessness of women is not enough. These are complex and intersectional issues that require bold, sweeping actions and the political will to take the first step beyond the words of the ordinance.

The gender-data is the strategy to achieve these shared goals. Moreover, the gender based data provides the Commission on the Status of Women and Girls, and the San Diego Board of Supervisors with the opportunity to review and discuss the impact of the County's strategies on closing the gender gap more effectively, with data-driven analysis and action-informing insights.

The gender based data is the metric for each County department and is necessary to measure and track its progress and develop each Gender Equity Action Plan. This includes,

- Viewing the gender-data as the baseline metric to measure the impact – as the starting point – to shaping strategic goals for each department in their strategic action plans;
- Reviewing the current County systems for its impact on closing the gender inequities and assessing, as necessary, for potential cost-effective improvements; and
- Ensuring that each Department Director tracks the evolution of their work as a performance indicator, including their immediate outputs for addressing gender-based discrimination and looking to training and capacity to fully implement Department strategic plans.

San Diego County has adopted a powerful tool to effect more equitable outcomes for women and girls, to improve government operations, and to measure the impact of direct and indirect services. Building the CEDAW ordinance into operations and performance indicators of each department is the best practice for using taxpayer monies to effectively address existing and systemic disparities, while closing the gender inequalities in San Diego.

I am encouraged by this resolution that seeks outcome based measures for effective implementation of the San Diego CEDAW ordinance, and am available to discuss additional recommendations and share best practices for an effective and efficient approach that the County could employ for compliance of the gender-data collection mandate.

UNITED NATIONS ASSOCIATION
OF THE UNITED STATES OF AMERICA
San Francisco Chapter

Thank you for your time, and commitment to eliminating all forms of discrimination against women and girls.

Ashley Raveche
President
United Nations Association, USA, San Francisco
Ratify Movement
5228 Diamond Heights Boulevard
San Francisco, California 94131
president@una-sf.org
www.una-sf.org | main (415) 580-2465

CC: District1Community@sdcounty.ca.gov; Terra.Lawson-Remer@sdcounty.ca.gov; engage@sdcounty.ca.gov; publiccomment@sdcounty.ca.gov