

# **County Public Benefits Phone Systems in California**

Creating a More Dignified CalFresh Experience

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## **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

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%.**<sup>1</sup> 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.**<sup>2</sup>

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

<sup>1</sup> 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>.

<sup>2</sup> 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.**<sup>3</sup> 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.

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<sup>3</sup> 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.<sup>4</sup> 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.

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<sup>4</sup> 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.<sup>5</sup>

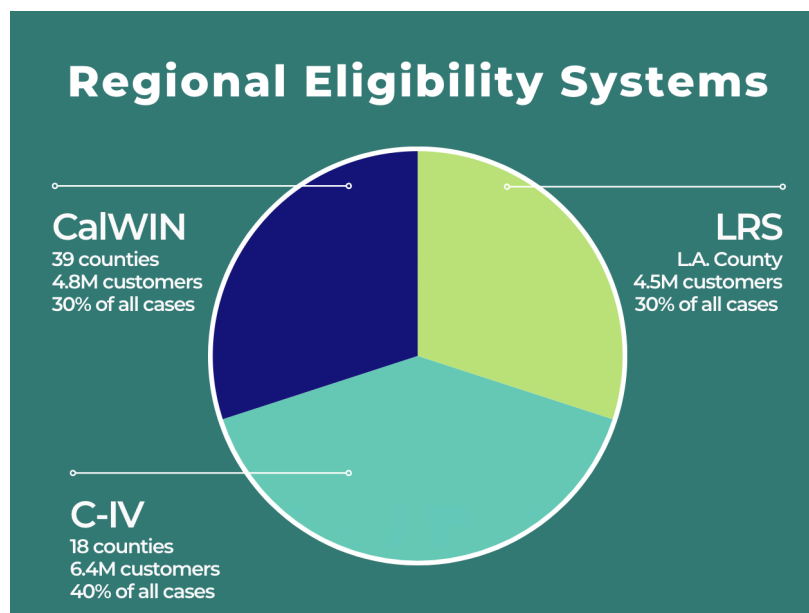
Running multiple systems posed many challenges. Difficulties with data integration, interoperability, and coordination between agencies often led to inefficiencies, administrative burdens, and errors in eligibility determination and benefit distribution.

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.

Fig. 2: CA Eligibility systems as of 2019



### 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.

<sup>5</sup> "History of Statewide Automated Welfare." *Ca/SAWS*. 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.<sup>6</sup>

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.<sup>7</sup>

**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.

<sup>6</sup> 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](https://www.govexec.com/media/aws_la_county_cloud_8.18.pdf).

<sup>7</sup> Amazon Web Services. "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=](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*<sup>8</sup> and Executive Order 13571 on *Streamlining Service Delivery and Improving Customer Service*<sup>9</sup> have sought to push the government into the digital era.

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<sup>8</sup> 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.

<sup>9</sup> 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.

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**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.<sup>10</sup>

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<sup>10</sup> 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.<sup>11</sup>

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).

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<sup>11</sup> 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.<sup>12 13</sup>
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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<sup>12</sup> 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.

<sup>13</sup> 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.

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<sup>14</sup>

2023 CalFresh Population: 4,225 people or 10% of total population<sup>15</sup>

**CSC**

**Self-Service IVR**

**Multiple Languages**

IVR Number: (877) 410-8802

Phone Number: (209) 223-6550

Hours of Operation: 24/7

Hours of Operation: M-F from 8 AM-5 PM

Language(s): 15 languages

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.

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

<sup>15</sup> 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<sup>16</sup>

2023 CalFresh Population: 321,332 people or 12.9% of total population<sup>17</sup>

**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<sup>18</sup>

2023 CalFresh Population: 167 people or 14.6% of total population<sup>19</sup>

**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.

<sup>16</sup> U.S. Census Bureau. "Riverside County, California: QuickFacts." Accessed April 20, 2024. <https://www.census.gov/quickfacts/fact/table/riversidecountycalifornia/PST045223>.

<sup>17</sup> 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>.

<sup>18</sup> U.S. Census Bureau. "Alpine County, California: QuickFacts." Accessed April 20, 2024. <https://www.census.gov/quickfacts/fact/table/alpinecountycalifornia/PST045223>.

<sup>19</sup> Ibid.

### 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<sup>20</sup>

2023 CalFresh Population: 1,576,356 people or 16.3% of total population<sup>21</sup>

**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.**

<sup>20</sup> U.S. Census Bureau. "Los Angeles County, California: QuickFacts." Accessed April 20, 2024. <https://www.census.gov/quickfacts/fact/table/losangelescountycalifornia/PST045223>.

<sup>21</sup> 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.<sup>22</sup>
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.

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<sup>22</sup> 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.<sup>23</sup>

### **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.<sup>24</sup> 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.<sup>25</sup>

#### **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.

<sup>23</sup> Anonymous CalFresh customer in discussion with author, March 11, 2024.

<sup>24</sup> 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>.

<sup>25</sup> 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.<sup>26</sup>

## 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

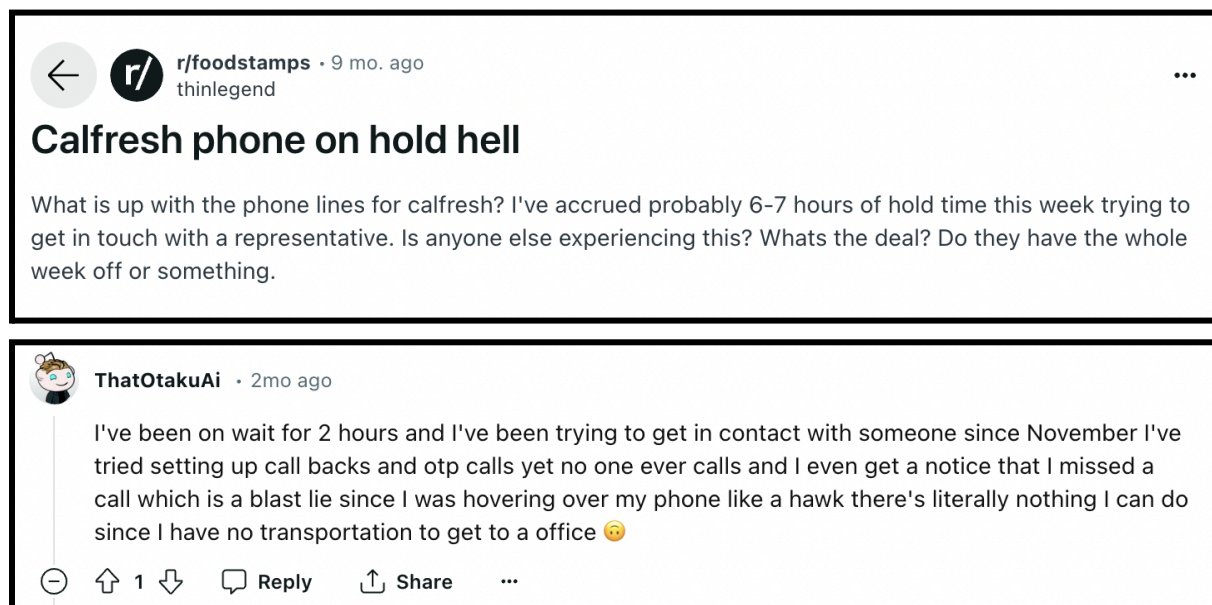
Wait time stands out as the primary obstacle reported in county public assistance phone systems. When asked about the most common barriers clients face using the CalSAWS phone system, every CBO employee interviewed identified wait times. Similarly, when CalFresh customers were questioned about potential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

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<sup>26</sup> Valerie P. (CalFresh customer) in discussion with author, April 10, 2024.

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



Source: [www.reddit.com/r/foodstamps](http://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.<sup>27</sup> A five-year study revealed that 78% of parents with low incomes worked jobs offering no flexibility whatsoever.<sup>28</sup> 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.

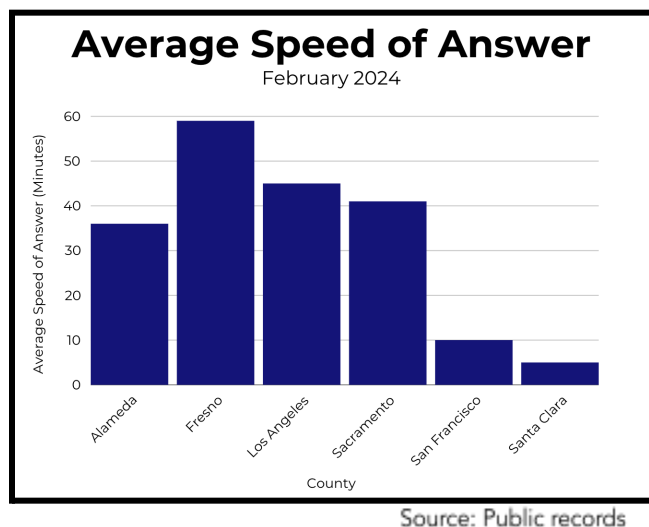
Journalist Annie Lowrey vividly illustrates the burden placed on individuals by inefficient government processes, dubbing it a "time tax." This concept is particularly poignant in the context of accessing public benefits like food stamps. **Low-income individuals often invest significant time and effort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

<sup>27</sup> 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.

<sup>28</sup> 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.<sup>29 30</sup>

Fig. 5: County CSC Average Speed of Answer Data



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  $\frac{2}{3}$  of the surveyed customers found wait times of less than two minutes to be acceptable, with 13% of respondents rejecting wait times entirely.<sup>31</sup>

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.

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

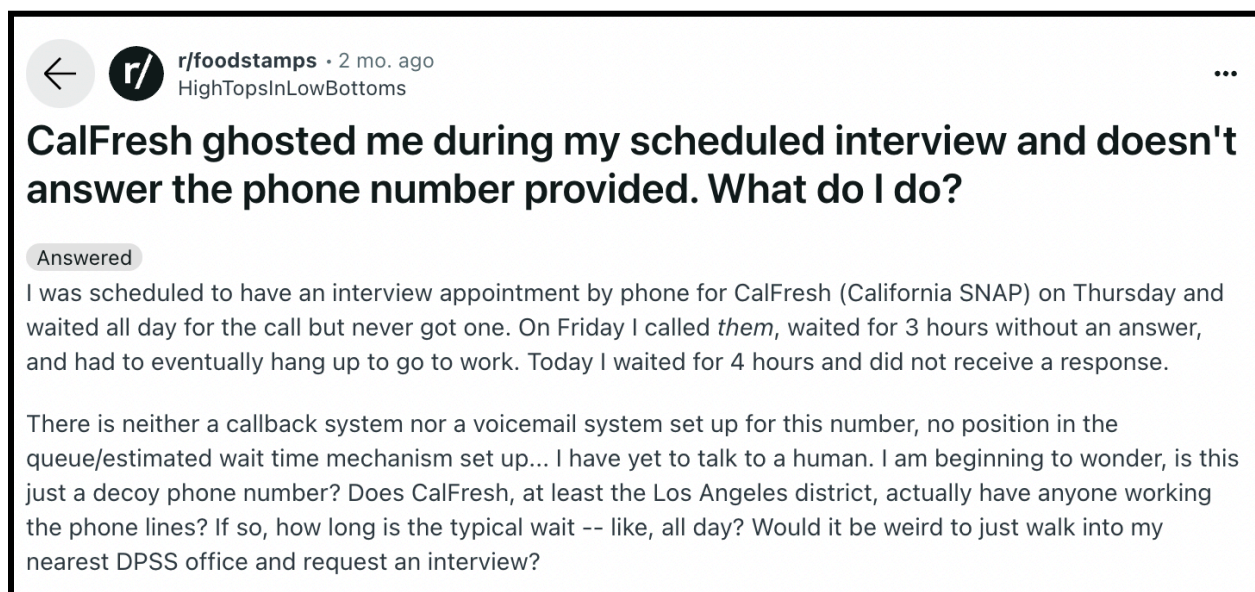
<sup>30</sup> Lowrey, Annie. "The Time Tax: Why Is So Much American Bureaucracy Left to Average Citizens?" *The Atlantic*, July 27, 2021. <https://www.theatlantic.com/politics/archive/2021/07/how-government-learned-waste-your-time-tax/619568/>. Accessed April 15, 2024.

<sup>31</sup> 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%20business%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](https://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.<sup>32</sup>

### **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.<sup>33</sup> 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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<sup>32</sup> Anonymous CalFresh customer in discussion with author, March 18, 2024.

<sup>33</sup> 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.<sup>34 35</sup>

## 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.

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<sup>34</sup> Anonymous CalFresh customer in discussion with author, March 11, 2024.

<sup>35</sup> 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.<sup>36</sup> 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

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<sup>36</sup> 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.

<b>Common Performance Metrics</b>	
<p><b>*Abandonment Rate:</b></p> <p><i>Frequency of customers hanging up before reaching an EW</i></p>	<ul style="list-style-type: none"> <li>● Reflects the effectiveness of CSC call-holding procedures.</li> <li>● May suggest that customers are experiencing long wait times before connecting with EWs.</li> </ul>
<p><b>*Average Handle Time:</b></p> <p><i>Total duration of a customer inquiry, from the initial contact, including any time spent on hold or waiting, up to the resolution.</i></p>	<ul style="list-style-type: none"> <li>● May reflect the expertise of EWs and the efficiency of customer service protocols.</li> <li>● A very low AHT may indicate that issues are being rushed and not thoroughly resolved.</li> </ul>
<p><b>*Average Hold Time:</b></p> <p><i>Duration during which an EW puts a caller on hold, whether to handle another call or to research the caller's issue.</i></p>	<ul style="list-style-type: none"> <li>● Longer hold times may lead to increased customer frustration and dissatisfaction.</li> <li>● May also reveal the adequacy of staffing levels to handle call volume.</li> </ul>
<p><b>*Average Speed of Answer:</b></p> <p><i>Average time it takes for an EW to answer a call.</i></p>	<ul style="list-style-type: none"> <li>● Gauges the responsiveness and service quality perceived by customers.</li> <li>● Called "average queue answer time" in Amazon Connect.</li> </ul>

<p><b>Callback Requests Rate:</b></p> <p><i>Frequency of callers opting for a callback instead of waiting on hold.</i></p>	<ul style="list-style-type: none"> <li>● High callback requests may signal insufficient staffing or resources to handle inbound calls.</li> </ul>
<p><b>Repeat Calls Rate:</b></p> <p><i>Frequency of calls from the same number.</i></p>	<ul style="list-style-type: none"> <li>● May indicate unresolved problems from initial contacts.</li> <li>● Can be used to identify frequently occurring customer issues.</li> </ul>
<p><b>*Transfer Rate:</b></p> <p><i>Frequency of calls transferred from one agent or department to another to resolve issues.</i></p>	<ul style="list-style-type: none"> <li>● Although some transfers are inevitable, multiple transfers may cause customer frustration.</li> <li>● CSCs should aim to keep them to a minimum.</li> </ul>

Customer Experience Metrics	
<p><b>Customer Satisfaction Score (CSAT):</b></p> <p><i>Measurement of customer satisfaction with a CSC's service delivery.</i></p>	<ul style="list-style-type: none"> <li>● CSAT assessments typically occur at the conclusion of a customer survey, employing a five-point scale to gather feedback.</li> <li>● Responses may range from "Highly satisfied" to "Highly unsatisfied" or any similar ranking system.<sup>37</sup></li> </ul>
<p><b>First Call Resolution Rate (FCR):</b></p> <p><i>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.</i></p>	<ul style="list-style-type: none"> <li>● A high FCR may indicate that a CSC is efficient in resolving issues.</li> <li>● May also suggest that customers do not need to spend additional time contacting support multiple times for the same issue.</li> </ul>
<p><b>Net Promoter Score (NPS):</b></p> <p><i>Measurement of customer loyalty and satisfaction.</i></p>	<ul style="list-style-type: none"> <li>● Asks the question, "How likely are you to recommend this CSC to a friend or colleague?"</li> </ul>

<sup>37</sup> 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>.

	<ul style="list-style-type: none"> <li>● Responses are typically given on a scale from 0 to 10, and responders are categorized into three groups: <ul style="list-style-type: none"> <li>○ Promoters (score 9-10)</li> <li>○ Passives (score 7-8)</li> <li>○ Detractors (score 0-6).</li> </ul> </li> <li>● 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.<sup>38</sup></li> </ul>
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\* 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.

<sup>38</sup> 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.<sup>39</sup> 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.<sup>40</sup>

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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<sup>39</sup> 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>.

<sup>40</sup> 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.<sup>41</sup>

#### 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.<sup>42</sup>

**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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<sup>41</sup> 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%20June%202024>. Accessed April 22, 2024.

<sup>42</sup> 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.<sup>43</sup>

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.<sup>44</sup>

## **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

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<sup>43</sup> Evangelista, Anae. Personal interview. March 6, 2024.

<sup>44</sup> Anonymous CBO employee. Personal interview. March 28, 2024.

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.<sup>45</sup> 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

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<sup>45</sup> Anonymous CalFresh customer in discussion with author, March 25, 2024.

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.<sup>46</sup> 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."<sup>47</sup> 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.

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<sup>46</sup> Anonymous CalFresh customer in discussion with author, March 11, 2024.

<sup>47</sup> 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.<sup>48</sup> 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.<sup>49</sup> Despite its potential benefits, the bill faced concerns from domestic violence survivors and advocates, who voiced concerns about confidentiality and safety. They

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<sup>48</sup> 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](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.

<sup>49</sup> 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.<sup>50</sup>

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"[...].<sup>51</sup> 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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<sup>50</sup> 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](https://www.cdss.ca.gov/Portals/9/ACIN/2019/I-31_19_ES.pdf?ver=2019-05-15-143511-943). Accessed April 22, 2024

<sup>51</sup> 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-cal-fresh-benefit/>.



### **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.<sup>52</sup> 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.

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<sup>52</sup> 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.

### **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.

### **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?

