

Chapter Three: Outreach Activities

CalFresh Information Line

Callers to the toll-free statewide CalFresh Information Lines (CIL) enter their ZIP code and receive information and a referral to the appropriate county office. The toll-free numbers are:

- 1-877-847-3663 (English)
- 1-888-9-COMIDA or 1-888-926-6432 (Spanish)

Each county selects how the CIL calls are handled. About 60 percent of counties refer the calls to a voice recording; others route calls to a live operator at the CalFresh office, 2-1-1 agencies, or to food bank help lines.

Events

The primary goal of CalFresh Outreach is to increase participation in CalFresh. Outreach can take place anywhere. However, outreach workers have found that bringing information to community events is very effective. Often, outreach workers will complete prescreening and application assistance at these events.

- ✎ See Chapter Five of this manual for details on prescreening and application assistance.

People who attend community events may not need services themselves, but may know someone who could use the CalFresh information.



Examples of community events include:

Health Fairs

Health fair organizers bring together the community stakeholders and provide information, health screening, and fun activities.

- ✎ This toolkit contains brochures and fliers that are ideal as “grab and go” pieces for community members who may want information but may not want to stop and talk to someone.
- ✎ Go to the *Consumer Fliers tab* and the materials section of your toolkit for information designed especially for these events.

Check bulletin boards and newspapers for information about upcoming health fairs, or attend planning collaborative meetings. Often, if you participate in planning an event, you

will have the best opportunity to promote your program to the organizers, other participating agencies, and people at the event.

Parents at Schools

In 2011, Assembly Bill (AB) 402 was signed in an effort to increase participation in CalFresh. The bill authorized school districts or county offices of education to enter into a memorandum of understanding with the local agency that determines CalFresh program eligibility to share information provided on the School Lunch Program application to determine an applicant's CalFresh program eligibility. Parents may not be aware that students eligible for free or reduced-price lunch may be eligible for CalFresh. In addition, students in families receiving CalFresh may be eligible for free or reduced-price school meals.

Back to School nights or Parent Teacher nights during the school year give you access to parents, many of whom may not know about CalFresh. Check with your local Parent Teacher Association,^{1,2} school district administrators, and school principals for other opportunities.

Retail Promotion

CalFresh participants use their benefits at grocery stores, farmers' markets, dollar stores, and mini markets. They can use their CalFresh benefits at any store or market that accepts the EBT card.³

The *Network-Retail Program* helps form partnerships between neighborhood stores and community health agencies to increase the consumption and purchase of fruits and vegetables among those who are CalFresh-eligible. It provides retailers with tools, resources, and outreach activities to inspire healthy change among consumers.⁴ Attending some of the *Network-Retail Program* promotional events and food demonstrations can be an effective way to increase enrollment in CalFresh.

Locations

To maximize CalFresh program reach, outreach workers find it helpful not just to attend events but to go to specific locations on a regular basis to find CalFresh applicants. Outreach workers have found that once they become a familiar face to the people accessing services, people are more willing to engage with them about CalFresh.

Examples of locations include:

Community Clinics

Community clinics and health centers (CCHCs) provide primary and preventive care to low-income individuals and families.^{5,6} CalFresh outreach takes place in some of these clinics but many clinics are not served.

¹ California Department of Education, *California School Directory*. Accessed September 9, 2012, <http://www.cde.ca.gov/re/sd/>

² California State PTA. Accessed September 10, 2012, <http://www.capta.org/>

³ Electronic Benefit Transfer (EBT) is an electronic system for distributing CalFresh, California Food Assistance Program, and cash aid benefits. In California the card is called the Golden State Advantage EBT card. For details on the EBT card go to: www.ebt.ca.gov. Some EBT card users can also access their general relief cash aid from their EBT card. CalFresh can only be used to purchase food items. It cannot be used to withdraw cash.

⁴ California Department of Public Health, *Network for a Healthy California – Retail Program*, June 2012. Accessed September 10, 2012, <http://www.cdph.ca.gov/programs/cpns/Pages/RetailProgram.aspx>

⁵ California Primary Care Association. Accessed February 14, 2013, <http://www.epca.org>

⁶ National Association of Community Health Centers, *California Health Center Fact Sheet, Summer 2011*. Accessed September 10, 2012, <http://www.nachc.com/client/documents/research/CA11.pdf>

There are more than 900 community clinics and health center sites throughout California. In 2012, these clinics served almost 5 million low-income individuals.⁸

Community health center or clinic staff often encourage outside speakers to teach classes, or to be on-site routinely to screen patients for programs that promote health. Contact your regional consortia for CCHC contacts in your area.⁷

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Faith-Based Agencies

The Center for Faith-Based and Neighborhood Partnership works to build and support partnerships with faith-based and community organizations in order to better serve individuals, families, and communities in need.⁹ USDA is linked to this partnership and has a toolkit in Spanish.¹⁰

You can introduce yourself to these agencies and let them know that you are a CalFresh outreach worker. Look for a directory of faith-

based centers in your area and offer to bring information to their events, put small ads in bulletins, or take fliers to the office. Outreach workers have also successfully conducted outreach at faith-based counseling offices, homeless shelters, and congregate meal sites.

Farmers' Markets

Many farmers' markets accept EBT/CalFresh. Some may also run a program that doubles the amount of fresh produce someone using CalFresh is able to purchase with their benefits. Farmers' markets are great places to distribute fliers or answer questions about CalFresh.¹¹



Family Resource Centers

In some counties, Family Resource Centers are housed within the county Welfare Department Offices; in others, they are housed within the Early Start Program (www.frcnca.org) and in others, they are independent centers that provide a broad array of resources for families.

⁷ California Primary Care Association, Regional Associations. Accessed February 14, 2013, <http://www.cPCA.org/index.cfm/peer-networks-workgroups/regional-associations-california/>

⁸ California Primary Care Association, *2012 Annual Report*. Accessed February 14, 2013, <http://www.cPCA.org/index.cfm/about/annual-report/>

⁹ U.S. Department of Health and Human Services, *About Faith-based and Neighborhood Partnerships*. Accessed September 10, 2012, <http://www.hhs.gov/partnerships/about/>

¹⁰ U.S. Department of Agriculture, Supplemental Nutrition Assistance Program, *La Mesa Completa*. Accessed September 10, 2012, <http://www.fns.usda.gov/get-involved/la-mesa-completa>

¹¹ U.S. Department of Agriculture, Agricultural Marketing Service, *Farmers' Market Search*. Accessed September 10, 2012, search.ams.usda.gov/farmersmarkets/

Food Distribution Sites

Community agencies such as food closets and food pantries obtain food from a larger food bank and from community food donations. Each organization then distributes the food, typically on a schedule. You can offer to conduct CalFresh Outreach at these times. Some food banks already do CalFresh Outreach at food distributions, so be sure to coordinate your efforts.¹²

Grocery Stores

Many grocery stores have community bulletin boards where you can post CalFresh information for shoppers. Other stores offer food at discounted prices.¹³

Schools

School counselors often come in contact with students in need of social services. You can bring brochures or fliers to school administrative

Older adults are among the fastest growing population in need of food assistance and can be located with help from the Area Agencies on Aging throughout California.¹⁴ Many do not know that they qualify for CalFresh.

offices and ask staff to give them to the counselors to distribute to their students. (Large outreach campaigns in the school setting require school administrative approval.)

Senior Centers

Older adults are among the fastest growing population in need of food assistance and can be located with help from the Area Agencies on Aging throughout California.¹⁴ Many do not know that they qualify for CalFresh.

 See the *CalFresh Outreach Basics Handbook for Older Adults* in this toolkit for details on effective outreach to older adults.

Shelters

Residents of homeless, domestic violence and refugee shelters may not be aware that they qualify for CalFresh. You can drop off outreach material, post information on bulletin boards, and even offer to make a presentation about the program requirements at a group meal.¹⁵ Shelter administrators generally appreciate someone who brings tangible resources to their residents.

Women, Infants, and Children Nutrition Program

WIC is a federally funded health and nutrition program for women, infants, and children. Participants must meet income guidelines and be pregnant, new mothers, or have infants or children under age five. Many WIC participants are also eligible for CalFresh. Outreach workers

¹² United Association of Food Banks, *CAFB Programs*. Accessed September 10, 2012, http://www.cafoodbanks.org/CAFB_Programs.html

¹³ U.S. Department of Agriculture, Food and Nutrition Services, *SNAP Retailer Locator*, August 2012. Accessed September 10, 2012, <http://www.snapretailerlocator.com/>

¹⁴ California Department of Aging, *Area Agency on Aging by County*, June 10, 2012. Accessed September 10, 2012, http://www.aging.ca.gov/ProgramsProviders/AAA/AAA_Listing.asp#S

¹⁵ HSD, *California Homeless Shelters and Social Services*. Accessed September 10, 2012, <http://www.homelesshelterdirectory.org/california.html>

report very successful partnerships with the WIC agencies and frequently conduct outreach at WIC offices.¹⁶

In California in 2010, 84 WIC agencies provided services locally to over 1.45 million participants each month at over 650 sites throughout the state.¹⁶

How to Partner

CalFresh outreach workers can be extremely effective if they partner with agencies that work with the same target audience. Attending collaborative meetings, where several agencies meet on a regular basis to share resources, is an excellent way to access your target population. It's also a great opportunity to make presentations to the staff and clients of the organizations serving the same population you are trying to reach.

The following are some examples of partnership:

- A food bank and a small nonprofit agency both want to increase services to their clients. They might partner and agree to make referrals to each other, co-locate services, and abide by mutual standards of confidentiality.
- A food bank and an association of nonprofit agency directors might want to raise awareness about benefit programs to relieve hunger in their county. They might

partner to provide training together in the community, share staff to cover a booth at a community forum, or make presentations to their boards of directors.

- A coalition addressing food security and a group dedicated to hunger advocacy might partner to co-sponsor a conference, alert each other to food security issues in the community, and share policy information.
- CDSS and California Department of Education (CDE) want to reduce barriers for students accessing reduced-price lunches. They might partner to share certain types of client data.¹⁷

Partnership Agreements

There are many kinds of partnerships. Some are informal, while others are more formal and may require a written agreement.

Selecting a Partner

The partnership agreement includes a description of the agencies involved, the items agreed, the length of the agreement, and the signatures of the authorized representatives. Some agreements have serious legal consequences if they are breached, such as the one described above between the CDSS and CDE. Other agreements might result in a loss of goodwill between the partners if either party defaults.

¹⁶ California Department of Public Health, *Women, Infants, and Children Program*. Accessed September 6, 2012, www.wicworks.ca.gov

¹⁷ Drafting an agreement to share confidential information is the most difficult type of partnership and requires a high degree of legal expertise, many rounds of approval and even public comment to make sure that all regulations are respected and client privacy is protected.

There are several mechanisms used to outline the terms of an agreement, such as:

- **Formal Inter-Agency Agreements** (IAA) between large government entities. CalFresh Outreach operates under an IAA between CDPH and CDSS.
- **Formal Memorandum of Understanding** (MOU) is negotiated by upper-level management and signed by the executive directors. MOUs are required between organizations, especially if money is changing hands. The MOU has significant legal consequences if either party defaults.

🔗 See *General Market Appendix G* for a detailed example of a Memorandum of Understanding.

Memorandum of Agreement (MOA) can be a very simple statement of understanding between agencies where each agency agrees to support the other's mission. They make and accept referrals, provide follow up on referrals consistent with client consent, co-host events in the community, and even co-locate services.

MOAs can be written with the same format used for the formal MOU in *Appendix G*, but will need much less detail.

Other valuable partnerships include partnerships with providers funded by the *Network for a Healthy California SNAP-Ed* program.¹⁸

- **First 5 California** is designed to ensure that more children under the age of five are born healthy and reach their full potential.¹⁹
- **Project LEAN** increases opportunities for healthy eating and physical activity in California communities to reduce the prevalence of obesity and chronic diseases such as heart disease, cancer, stroke, osteoporosis, and diabetes.²⁰

Developing a partnership builds trust. Many fruitful associations began as informal agreements.

The **California CalFresh Listserv**, hosted by Benchmark Institute, is available to CalFresh outreach workers. It is a place to build partnerships with others interested in promoting CalFresh in the community. The listserv provides accurate information that dispels many myths about CalFresh eligibility. Members can post questions and offer solutions to questions posted by others. Join now and encourage others to do the same.²¹

You can encourage your organization to **create a link from your agency website to www.CalFresh.ca.gov**. The CalFresh site has access to approved outreach material, CalFresh application forms in 16 different languages, and a link to the online application website in both English and Spanish.²²

¹⁸ California Department of Public Health, *About the Network for a Healthy California*. Accessed September 10, 2012, <http://www.cdph.ca.gov/programs/cpns/Pages/AboutUs.aspx>

¹⁹ First 5 California, *Welcome to First 5 California*. Accessed September 10, 2012, <http://www.cfc.ca.gov/>

²⁰ California Project Lean, *Promoting Healthy Places and Policies*. Accessed September 10, 2012, <http://www.californiaprojectlean.org/default.asp>

²¹ Food Assistance Skills Training, *Join the Food Stamp List Serv*. Accessed September 10, 2012, <http://fs10.formsite.com/CAFB/form907773838/index.html>

²² *Your Online Resource for California Benefits Simplified*. Accessed September 8, 2012, <http://www.benefitscal.org> and <http://beneficioscal.org>

Household Outreach

Raising state and community awareness is a key aspect of CalFresh Outreach. The three core elements to outreach at the individual client level include:

- **Prescreening** that provides basic CalFresh information.
- **Application Assistance** where the outreach worker helps the client to complete the actual CalFresh application.
- **Follow Up** on the application once it is submitted to the local CalFresh office to ensure that:
 - 1) it can be evaluated for eligibility and
 - 2) those eligible can retain their benefits.

Helping a client and following up on an application require a good working relationship with the local CalFresh office.

Building and Sustaining a Productive Relationship with Your CalFresh Office

There are almost 400 county CalFresh offices spread throughout the 58 California counties. Each county administers CalFresh according to federal and state regulations. Each county has the authority to implement the program to best suit its county. Each county, and sometimes each office within the same county, may have a slightly different preference about how the outreach worker should assist the client with the application. For example:

In all counties, only the CalFresh eligibility worker (EW) at the CalFresh office can determine a client's eligibility for CalFresh.

- Some counties want a completed multi-page application, including all supporting documents from the CalFresh outreach worker.
- Some counties only want the first page of the application and a referral.
- In some counties, only county workers conduct outreach.
- Some counties fund CBOs to conduct outreach.
- In some counties, CBOs are funded by their local county and through the Statewide CalFresh Outreach Plan.
- In some counties the only funding for outreach comes to CBOs from the CalFresh Statewide Outreach plan.

In all counties, only the CalFresh eligibility worker (EW) at the CalFresh office can determine a client's eligibility for CalFresh.

When working with the CalFresh office to facilitate the application process, it is not possible to provide a one-size-fits-all approach. It is essential to have good rapport with your county, but you must talk to your supervisor and other outreach contractors first before

approaching your county for partnership. Local CBOs may have partnership understanding and even written agreements in place, and it is important to respect what has been approved by the county before trying something new.

Starting off on the right foot will be an important first step to your long-term success as a CalFresh outreach worker. Here are a few tips to keep in mind:

- You and the CalFresh office eligibility worker (EW) are on the same team. You all want people who are eligible for CalFresh to receive benefits.
- Follow the Golden Rule. It takes time for trust and partnerships to develop, as with any other relationship.
- Understand what the county wants you to tell a client about how to apply for CalFresh and how to refer clients who appear to qualify for Expedited Service. Gathering this information from the CalFresh office is a good way to make the connection.

Once you have established your partnership with the CalFresh office in your county, it must be maintained and strengthened.

- **Acknowledge what the county does well.** If you hear back from a client that an eligibility worker was helpful, be sure to pass along the praise to his or her supervisors. Just as success stories build you up, they also edify your county partners. Be sure to share!

- **Treat your CalFresh office as a partner.** Ask what you can do for them. Notify them if you know there is a media spot that will be running. Invite them to present at your meetings or to co-host trainings.
- **Report trends.** Instead of reporting every problem you come across, keep an eye out for trends. Letting the county know about the trends you notice helps them identify areas for EW training. For example, several EWs have moved to CalFresh from another program and mistakenly believe finger imaging for CalFresh applicants is mandatory. (Finger imaging is no longer required for CalFresh but it is required for CalWORKs.) Letting the office know about similar problems can alert the supervisor to a training need for the EWs.

Media Materials

CalFresh is a federal entitlement and is highly regulated. Any material that is used to promote CalFresh in the community must have prior CDSS approval. Gaining approval of sensitive material takes considerable time.

CDSS strongly encourages CalFresh outreach contractors to use already approved materials. New materials developed require CDSS approval before you can use them.

Train Community Partners

As a trained outreach worker, you become a CalFresh content expert for your community and you are encouraged to partner with your local CalFresh office to provide training to community members about CalFresh.

- ✎ Much of the material in this toolkit is suitable for training community partners. Training PowerPoint slide shows are available in *General Market Appendix D*.

Evaluation

Tracking Outreach Activity and Measuring Outcomes

CalFresh Outreach Prime Contractors are required to submit quarterly activity reports to CDSS and sometimes to other funding agencies. CDSS is required to verify reports that the contractors submit. This verification includes a review of the contractor's operation and the outreach worker activity logs and reports.

The very best way to report your activity is to keep track of it on a daily basis. Have the reports in an orderly manner, and keep copies of reports that you submit to your supervisor. Each agency can put its own outreach worker reporting packet together as long as it includes a:

1. Narrative summary
2. Tracking log that allows you to keep track of your outreach activities at the client level: Prescreening, Application Assistance and

Follow Up, Quarterly and Semi-Annual Reporting, and Annual Recertification^{23,24}

3. Materials distribution log where you have kept track of the type and amount of approved CalFresh material distributed, along with the locations where material was distributed
4. List of training events and sign-in sheets
5. List of partner agencies with copies of agendas for meetings attended
6. Mileage log (if not kept elsewhere)

- ✎ See *Worksheet A* for a CalFresh Outreach Activity Log template and *Worksheet B* for a Materials Distribution Log template.

Measure Outcomes

CalFresh Outreach is funded to increase the number of eligible households in California actively receiving and using CalFresh.

In the Outreach contract, outreach workers are asked to report the status of the applications that they assisted once the information is readily available. However, most CalFresh outreach workers are not able to systematically report assisted applicant enrollment rates because this information is not readily available.

Here are some ways to obtain this data:

- **Case Determination Information from Clients**
The outreach worker may have the opportunity to learn from some assisted

²³ When you assist a client with an online application, there may be an option to print a report that you can attach to your tracking log. See appendix I for CBO Web Portal registration and reports.

²⁴ The Food Stamp Application and Screening Tool (FAST): FAST is an excellent tool for tracking all prescreens conducted, applications assisted and follow-up. (See Chapter 5)

applicants if they were ultimately enrolled. However, assisted applicants most commonly recontact the outreach worker when they are having trouble with the application process, not when they have successfully received benefits. Still, outreach workers can ask assisted applicants if they are willing to be recontacted after several weeks to see if they have been able to enroll in CalFresh.

- Outreach agencies can randomly sample a subgroup of assisted applicants for a systematic estimate of enrollment rates. Of course, this requires a commitment of time and effort on the part of the outreach agency, and finding assisted applicants is often challenging.

- **Case Determination Information from Counties**

In a few cases, counties are able to provide case determination information for outreach-assisted applicants, usually when additional data is available. County data is ideal since CalFresh systems track case determination and generate “denial codes” if a given application is not accepted. Denial codes provide additional management-oriented information that can be used to shape and improve the type of outreach services provided.

Of course, tracking outreach-assisted applications requires a system for identifying these applicants from among the larger pool of applicants. It also requires considerable county resources to “manually” check the

status of each individual application, since current computer systems are not set up to allow for automatic queries. Finally, if available, case determination information is typically provided in an aggregate form due to client confidentiality regulations. Given the considerable increase in CalFresh demand coupled with reduced county resources, county data on outreach case determination is rarely available.

Estimating CalFresh Enrollment or “Success Rates” Due to CalFresh Outreach Activities

Evaluators at the state will estimate the number of new CalFresh households due to outreach activity based on the number of CalFresh Outreach Worker Assisted Applications. Each county reports, on a monthly basis, the number of CalFresh applications received, approved, denied, and withdrawn.²⁵

These reports are used to calculate an average statewide monthly application “success rate.” In 2011 this was 63.4 percent. Assuming that outreach-assisted applicants have the same “success rate” as the counties overall, this percentage is applied to the number of reported outreach-assisted applications.

For outreach workers providing phone referrals, such as the 2-1-1 agencies contracted to complete phone outreach, and callers assisted by the statewide toll-free CalFresh information line (CIL), it is assumed that five percent of the callers will ultimately apply for CalFresh. This estimate is based on previous years’ county

²⁵ California Department of Social Services, *CalFresh – Data Tables*. Accessed September 10, 2012, <http://www.cdss.ca.gov/research/P349.htm>

| | QUANTITATIVE | QUALITATIVE |
|---------------------------|--|---|
| Process Evaluation | SOW Target Numbers: <ul style="list-style-type: none"> • Partners • Materials • Events Tabled • Trainings Hosted • Individuals Trained • Callers • Prescreenings • Application Assists • Online App Assists • Follow Up • Bi-Annual Reporting Assists • Annual Re-Certification Assists • Informed About CalFresh if off CalWORKs | Anecdotal feedback from outreach staff, recipients, community partners on the quality and/or usefulness of outreach services. |
| Outcome Evaluation | SOW Target: Households successfully enrolled (increased participation) <ol style="list-style-type: none"> 1. Approval Rates <ol style="list-style-type: none"> a. Actual rates when available from your County CalFresh offices. b. Reports from applicants. c. Estimate rates based on statewide averages. | Anecdotal feedback from outreach recipients indicating that outreach staff provided them assistance to enroll in CalFresh, that they received benefits, and/or how these benefits helped them. Capture client success stories to demonstrate the success of outreach, break stereotypes about the people on CalFresh, and use for media, newsletters, etc. |

data, which showed a five percent increase in application submissions following the USDA’s media campaign to promote the CIL number. Again, it is assumed that the same statewide approval rate will apply to these new applications.

This approach likely results in a conservative estimate of the number of “new” CalFresh households due to outreach efforts, since it does not include new cases brought into CalFresh as a result of prescreening, training, and other collaborative efforts. But the approach represents a reasonable estimate based on the information available. As a greater percentage of outreach-assisted applicants are submitted through online systems, it is hoped that technological improvements will make even more accurate estimates possible.

The table above provides a matrix that outreach workers can use to fully report their CalFresh activities.

Information gathered to complete a program evaluation falls into four main categories:

- Quantitative Process
- Qualitative Process
- Quantitative Outcomes
- Qualitative Outcomes

Quantitative refers to activities that are evaluated with numbers, such as the number of prescreens. Qualitative information is narrative, as in describing a particular case or event, and lends texture to the evaluation that numbers do not capture. Process information describes “the journey toward the outcome” or the program activities, and Outcome reports the results.

 For a list of CalFresh outreach partners participating in the CalFresh Outreach Plan and the counties they serve, see *General Market Appendix A2*.

To learn more about CalFresh Outreach in California, go to www.CalFresh.ca.gov.