Tracking and Reporting

STRATEGIES TO MAXIMIZE CALFRESH OUTREACH EFFECTIVENESS

Learning Objectives

1. Tracking is doable!
2. Tracking is helpful!
3. Participants walk away with a list of required and potential items to track as well as templates to consider utilizing.

STEP 1: Identify what to track and why

CDSS Contract things to report:

# of Initial CF applications submitted

# of Initial CF applications approved

# of SAR7s submitted

# of Recertifications submitted

# of individuals served that fit the following categories (individuals served can fall into more than one category)

For each interaction:

- Senior
- Veteran or Active Duty Military
- Latino
- Mixed Status Household
- Immigrant
- Working
- None/other

STEP 2: Dig deeper

Items to consider tracking when focusing on follow up:

- Verifications
- Interview completion
  - If so, are there outstanding documents to turn in?
  - If not, has the interview been rescheduled?
- Eligibility determination
  - Was it appropriate?
  - Is there room for client advocacy? If so, on what grounds?

STEP 2: Dig deeper

Other items that could improve your internal program:

# of people in the household

Benefit amount

Reason for denial

County office/caseworker assignment

Others?

STEP 3: Develop a system

Excel sheet

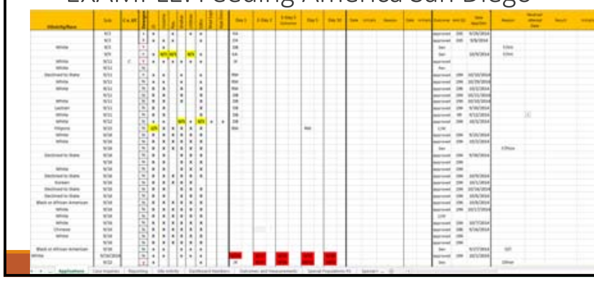
Customized database

- Specific to CalFresh
- Part of a larger database client case management system
- Examples: Oasis Insightly, Point Care, Salesforce

EXAMPLE: Feeding America San Diego

Before

EXAMPLE: Feeding America San Diego



STEP 4: Enter data and run reports

General template that's helpful when elevating case issues to a county staff member, Legal Aid or other entity:

- Case name
- Case number, DOB, last 4 of SSN
- Date of application
- Concise summary of concern (2-3 sentences)
- Specific ask

STEP 4: Enter data and run reports

Identify trends and issues to be resolved

- Prioritize

Determine how to work with your county to address issues

- Start with easy wins
- Create value

Final Considerations

Know your CalFresh and **know when** to advocate

- County program guide language
- CDSS website: letters & notices
- Foodstampguide.org
- SNAP listserv
- Legal Aid Society

Understand your county and what's **the best way** to advocate

- Work with your county to develop a system that works for everyone