

Enhancing Call Center Efficiency: Drawing from Napa County's Best Practices

Jazmin Mercado, AA

Departmental Administrative Analyst

County of Santa Cruz Human Services Department

EXECUTIVE SUMMARY

Santa Cruz County's Human Services Department-Employment & Benefit Services Division (HSD-EBSD) continues to experience high call volumes and long wait times, with average wait times exceeding 48 minutes for Medi-Cal and CalFresh calls over the past year and a half. This impacts both customer satisfaction and staff productivity. A recent internal review found that approximately 37% of incoming calls could be resolved by clerical staff. Napa County successfully addressed similar challenges by implementing a two-tier call center model, where clerical staff handle routine inquiries and escalate complex issues to eligibility workers. Santa Cruz has a comparable structure at its walk-in customer service centers, where Office Assistants (OAs) already manage many customer needs efficiently.

By leveraging existing staff, Santa Cruz can pilot this model without adding new positions. OAs are well-equipped to expand into phone support, reducing strain on Benefit Representatives (BRs) and allowing them to focus on more complex casework and timely benefits approvals. The pilot would also promote career development for OAs while improving service delivery and reducing costs by aligning tasks with staff skill levels. With clear role definitions, targeted training, and inter-departmental collaboration, this approach offers a customer-centered, fiscally responsible path to more efficient operations.

Introduction

Reaching out for help during difficult times can be challenging and often intimidating. In the field of Human Services, it is our responsibility to reduce barriers and ensure that access to safety-net services is as seamless as possible.

Santa Cruz County is home to approximately 262,406 residents, with 89,576 individuals receiving Medi-Cal and 41,765 receiving CalFresh benefits (U.S. Census). Guided by the motto "Dedicated to making a difference," Santa Cruz County consistently seeks innovative ways to improve operations and enhance service delivery.

An ongoing challenge has been managing high call volumes and extended wait times, which impact both customer satisfaction and staff efficiency. This issue is not unique to Santa Cruz, as counties across California have faced similar hurdles. In early 2020, Napa County addressed this problem by implementing a two-tier service model that integrated eligibility staff into call center operations, resulting in shorter wait times and improved customer service.

Santa Cruz County HSD-EBSD has explored ways to improve call center operations, including the implementation of courtesy callbacks, which allow callers to request a return call instead of waiting on hold. While this feature has helped reduce some of the strain on the call center, it has also introduced new challenges. BRs report that customers often submit multiple callback requests due to delays in receiving responses, leading to confusion for both staff and the public. These delays are frequently the result of inaccurate callback timeframes, where customers are told they will be contacted within a specific period, but the call often comes later than expected.

Napa County's Approach

In January of 2020, Napa County launched the Call Center Quality Improvement (QI) Project, led by a project and QI lead, along with a team of subject matter experts. The project was initiated to enhance customer satisfaction, as customers frequently reported wait times exceeding an hour when calling the call center. Another key objective was to reduce the volume of "Contact Client" tasks assigned to staff, as these tasks often resulted in returned call messages and delays.

After thorough discussions and consideration of standard program metric thresholds, Napa County's main goal was to reduce average call center wait times to six minutes or less and ensure that 90% or more of calls had a maximum wait time of no more than sixteen minutes. To achieve this, Napa County implemented the following:

1. Incorporated Eligibility Specialists into call center operations: Previously, only Office Assistants answered calls. The new two-tier model made Eligibility Specialists available should a customer need to be transferred for eligibility-related calls.
2. Established language-based phone queues: Separate queues for English and Spanish were created.

3. Introduced a Callback Option: Customers waiting in the queue could now opt to receive a callback, holding their place without remaining on the line.

As part of the restructuring, Napa County established a dedicated call center unit made up of two Eligibility Specialists. These specialists focus on “one and done” calls and support other eligibility-related tasks for Medi-Cal and CalFresh, but do not maintain ongoing caseloads like all other eligibility staff.

To monitor and maintain performance, Napa County uses a call center dashboard to track real-time metrics. When wait times exceed target thresholds, additional staff are temporarily assigned to assist. The team evaluates several key indicators to determine when extra support is needed, including the number of available agents, the number of callers waiting, the longest wait time in the queue, and the status of agents—whether they are actively talking or in ‘not ready’ mode. Scheduled breaks and lunches are also considered in staffing decisions. It is a coordinated team effort as Eligibility Supervisors and Senior Office Assistants actively monitor the dashboard and request backup when necessary. Call center agents also play a key role, monitoring wait times and escalating the need for assistance if supervisors are unavailable. Additionally, monthly meetings involving the Deputy Director, Program Managers, Supervisors, and the Data Analyst are held to review performance data and adjust staffing as needed.

While the project achieved several successes, most notably the integration of Eligibility Specialists and the implementation of the callback feature, Napa County also encountered challenges. These included technological limitations and general staffing constraints. Despite the challenges, the two-tier call center system has had a very positive outcome, resulting in better customer service.

Comparison to Santa Cruz County

Santa Cruz County has a service model similar to Napa County’s at its walk-in customer service centers. The county currently operates two walk-in customer service centers: one in North County (Santa Cruz, CA) and one in South County (Watsonville, CA). On average, about 3,370 customers are assisted each month at each site. Each location is staffed with OAs and BRs who provide support across all public assistance programs. Typically, two OAs and four to five BRs are available during walk-in hours. Wait times vary, but customers are often seen more quickly by OAs, whose tasks are generally shorter than those of BRs. In a recent analysis for the last six months, on average, customers waited 27 minutes to be assisted by a BR and only 11 minutes by an OA. Many issues can be resolved at a clerical level, making walk-in customer service centers more accessible and efficient for the community.

BRs are cross-trained to work in both the walk-in customer service center and the call center. However, a key difference exists: OAs are not currently utilized in the call center. Previously, this option was not explored due to a backlog of clerical work. As a result, BRs have had to handle all inquiries, including those that could be more efficiently resolved by clerical staff, contributing to longer wait times and increased call volumes. With the backlog now resolved, the county can begin exploring the integration of OAs into the call center to enhance efficiency and more effectively manage call volume and wait times.

The clerical team supporting operations for the Employment and Benefits Services Division (EBSD) has demonstrated efficiency in managing current responsibilities and has the capacity to take on additional tasks within their daily workflow. Their role already requires flexibility and a broad understanding of public assistance processes, making them well-suited to support phone operations. Many of their existing duties—such as answering the division’s general phone line and directing customers appropriately—align with the support needed in the call center, making this a natural extension of their role.

Expanding their assignment to support the call center would help reduce long wait times and high call volumes, while also preparing OAs for future promotional opportunities. By handling a greater volume and variety of incoming calls, OAs will strengthen key skills such as communication, problem-solving, and adaptability—abilities that are vital for advancement into higher-level roles. This hands-on exposure not only builds OAs' readiness for promotion but also enhances their familiarity with a wider range of customer service functions and internal systems.

This expansion benefits both staff and the community as it aligns call center operations with the efficient service model already in place at the walk-in customer service centers and emphasizes Santa Cruz County’s commitment to investing in internal talent while delivering high-quality, responsive services to the community.

Recommendations

To improve efficiency and reduce call center wait times—which have averaged over 48 minutes per call for Medi-Cal and CalFresh in the past year and a half—Santa Cruz County HSD-EBSD should consider piloting a two-tier customer service model, similar to the system implemented in Napa County. Under this model, callers would first be assisted by OAs, who would assess the nature of the call and determine whether it can be resolved at their level or should be requeued. Calls involving eligibility-related actions or questions would be requeued to speak to a BR. This approach mirrors the in-person experience at walk-in customer service centers, where initial screening helps direct customers to the appropriate level of support.

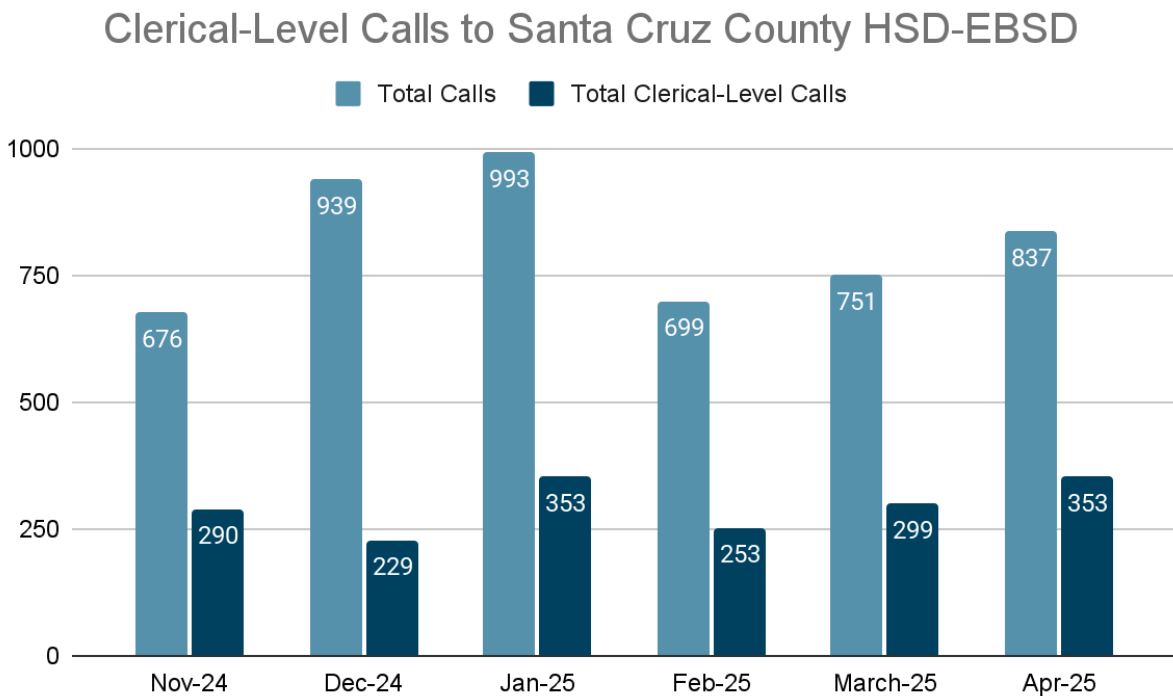
This approach would not initially require additional staffing, as the county’s existing workforce—including 121 FTE BRs and 22 FTE OAs—is sufficient to support a pilot program. If the pilot proves effective, a gradual shift in responsibilities could be implemented, freeing BRs from high-volume phone duties and expanding the OA role to manage incoming calls. Over time, this would allow BRs to dedicate more of their time to complex casework, eligibility determinations, and the timely processing of benefits. By aligning responsibilities with staff skill levels, the county can increase efficiency, reduce processing delays, and improve the customer experience. This targeted approach also positions the county to get more value from each BR role while optimizing its use of support staff, ultimately creating a more responsive and cost-effective system.

To launch this pilot, the following steps are recommended:

- Clearly define roles and responsibilities for OAs and BRs involved in call handling.

- Acquire necessary phone licenses and complete any technical setup required.
- Develop and deliver training materials tailored to the new responsibilities of OAs.

To support these recommendations, a recent review of calls dispositioned by BRs over the past six months found that, on average, at least 37% of incoming calls required only clerical-level assistance—tasks well within the capabilities of an OA. These calls often involve routine actions such as updating contact information, processing EBT card requests, or reprinting correspondence.



Cross-departmental collaboration will be essential to implement this change effectively. With thoughtful planning and execution, Santa Cruz County can significantly improve customer service, enhance internal efficiency, and build a more responsive service delivery model.

Conclusion

Improving call center operations in Santa Cruz County is not only achievable but also essential for enhancing public access to vital safety-net services. As the demand for public assistance remains high, particularly among the county’s Medi-Cal and CalFresh recipients, it is critical to ensure that support is timely, accessible, and responsive to community needs. The current structure, which relies solely on BRs to handle all incoming calls—regardless of complexity—places unnecessary strain on staff, contributes to extended wait times, and impacts the overall customer experience.

Drawing from the successful model implemented in Napa County, Santa Cruz HSD-EBSD has a unique opportunity to transform its own call center operations by piloting a two-tier service model. This approach would integrate OAs into phone operations to handle non-eligibility-related inquiries, replicating the efficient and accessible support already provided in walk-in customer service centers. By doing so, BRs could focus more on case processing, increasing productivity and reducing the number of follow-up calls and delayed responses.

Notably, this model does not require immediate additional staffing, as Santa Cruz already has a capable team of OAs who possess the knowledge and flexibility to take on these responsibilities. Their ability to perform such tasks is demonstrated daily through their work assisting customers in the walk-in customer service centers—handling functions such as processing EBT card requests, reprinting correspondence, and aiding with filling out applications, to name a few. Implementing the pilot would involve clear role definitions, targeted training, and technical adjustments: steps that are both manageable and cost-effective. In fact, the potential long-term savings from restructuring roles could be significant, as OAs have a lower salary range compared to BRs, offering a fiscally responsible path to improved service delivery.

This initiative aligns with Santa Cruz County’s commitment to innovation, internal development, and equitable access. Empowering clerical staff with new responsibilities creates opportunities for career growth and prepares them for future advancement. At the same time, the community benefits from shorter wait times and a more seamless experience when accessing safety-net services.

Ultimately, adopting a two-tier call center model represents a strategic and forward-thinking investment in the department’s operations. With thoughtful implementation and cross-departmental collaboration, Santa Cruz County can establish a more resilient, responsive, and customer-centered service delivery system: one that not only addresses current operational challenges but also lays the foundation for future improvements in human services.

Acknowledgements

I would like to extend my sincere gratitude to Natalie Ortiz and the dedicated staff at Napa County, who graciously welcomed me and supported my case study. Your openness, flexibility, and willingness to share your insights are deeply appreciated. Your collaboration has not only enriched my understanding of your two-tier call center model but will also be instrumental if Santa Cruz County embarks on a similar path.

A heartfelt thank you, as well, to my team in Santa Cruz County—directors, managers and colleagues—whose encouragement, guidance, and support helped carry this project forward. Whether through brainstorming sessions, reviewing drafts, or simply offering words of encouragement along the way: you know who you are, and I am truly grateful for each of you.

Lastly, I want to give a huge shoutout to my family for their unconditional support throughout my BASSC journey. To my loved ones who stepped in with my kids, managed the day-to-day while I was away, and made it possible for me to focus and grow through this process—thank you. I appreciate you all from the bottom of my heart.

References

- California Statewide Automated Welfare System (CalSAWS). (n.d.). *Qlik Sense dashboard: [Wait Statistics for Longest Wait Time- Case List]*. Retrieved May 12, 2025, from <https://viz.calsaws.net/auth/sense/app/3fa5a9c5-17af-48fa-89fb-0f16c033d95f/sheet/eb1d8452-c014-49d4-9ebe-9310c6ad37aa/state/analysis>
- California Statewide Automated Welfare System (CalSAWS). (n.d.). *Qlik Sense dashboard: [Wait Statistics for Shortest Wait Time- Case List]*. Retrieved May 12, 2025, from <https://viz.calsaws.net/auth/sense/app/3fa5a9c5-17af-48fa-89fb-0f16c033d95f/sheet/5fc5f270-3801-4e8b-a267-bd6ec3bce78b/state/analysis>
- CalSAWS. (n.d.). *Call log data collection tool*. California Statewide Automated Welfare System. Retrieved May 8, 2025, from <https://web.calsaws.net/c-iv/datacollection/CallLog/defaultList> [Internal system; not publicly accessible]
- California Statewide Automated Welfare System (CalSAWS). (n.d.). *Reception log*. <https://web.calsaws.net/c-iv/datacollection/ReceptionLog/defaultList?auditLinkText=Reception%20Log>
- California Statewide Automated Welfare System (CalSAWS). (n.d.). *Queue volume – monthly [Report]*. https://calsaws.egain.cloud/Portal/Reporting/CalSAWS_AWSConnect/C44/Canned%20Reports/Monthly/Queue%20Volume%20-%20Monthly..xny
- County of Santa Cruz (n.d.) *Social Services Program Maps by Jurisdiction*. <https://santacruzhumanservices.org/Home/AboutUs/MakingaDifference/SSPMaps>
- County of Santa Cruz. (n.d.). *Salary schedule*. Personnel Department. Retrieved May 8, 2025, from <https://www2.santacruzcountyca.gov/personnel/salsched/salsched.asp>
- Ortiz Sepulveda, N., Muller, A., & Ayala, E. (2025). *Napa County Self Sufficiency Services: Client-centered experience – BASSC spring project 2025 [PowerPoint slides]*. Napa County Health & Human Services Agency.
- U.S. Census Bureau (n.d.) *Santa Cruz County*. <https://www.census.gov/quickfacts/fact/table/santacruzcountycalifornia/PST045224#PST045224>