

Block Scheduling: Solano County's Strategy to Enhance Appointment Scheduling Efficiency

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EXECUTIVE SUMMARY

Solano County developed a strategy to eliminate backlogs with its CalFresh appointments. One of the driving forces behind this procedural change was the need to design a process that would easily adjust to continuously changing circumstances. The Covid-19 pandemic was marked by a surge in public assistance applications, similar to many counties. Staff turnover at various levels, coupled with low morale, was a contributing factor to backlogs in appointments and tasks. Solano County's block scheduling model addresses many of the barriers counties encounter when dealing with backlogs. Data-informed decision-making led to the realization that block scheduling would eliminate the backlog while also being a flexible model that can be adjusted to fluctuations in the number of applications received.

This case study examines the block schedule that Solano County piloted for its public assistance program applications and the strategies used to implement the pilot. This case study also provides recommendations that San Francisco County can take to help improve the appointment backlogs for the County Adult Assistance Programs.

Introduction

Throughout my career with the San Francisco Human Services Agency, particularly in the County Adult Assistance Programs, an area that I have consistently focused my growth and development on is evaluating the program's effectiveness—especially in intake application case assignments. Benefit and social service programs require efficient processing and a timely determination of eligibility for benefits. Various factors, including staffing challenges and changing circumstances in business practices and policies, impact caseload volumes and the ability to process cases in a timely manner. I was excited to have the opportunity to study how the Solano County Health and Human Services Agency developed a more efficient method for scheduling and assigning CalFresh and CalWORKs intake appointments.

Background

While federal regulations have long established application processing timelines for SNAP benefits—known in California as CalFresh—the state has consistently emphasized the importance of issuing benefits promptly. In 1987, California passed Assembly Bill 2384, Chapter 1293, Statutes of 1987, which updated CalFresh policy. The updated regulation, which went into effect in 1988, ensured all applicants were orally informed of expedited services and reduced the number of days that benefits should be made available to clients eligible for expedited services from five to three. ACL NO. 88-54 states “county welfare departments are to make benefits available to households entitled to expedited services, no later than the third calendar day following the date the application was filed.” Current federal regulations mandate a processing time of seven days for expedited services. The implementation of this regulation emphasizes the importance of ensuring that eligible applicants in California receive their benefits on time.¹

In 2012, “Assembly Bill 1359 (Chapter 468, Statute of 2012) amended Welfare and Institutions code Section 18914, to require counties to screen all CalFresh applications to determine if applicants meet the criteria for ES entitlement”.² The adoption of this new policy meant that counties needed to establish business processes that ensured all cases could be processed promptly and correctly. Adhering to the Expedited Services timeframe would become crucial, as this became one of the metrics used to determine the county's error rate and the necessity of corrective action plans. Application processing timeliness is something the state collectively has been trying to improve. Per the USDA Food and Nutrition Service, the published application processing timeliness rate for California in FY 2023 was 82.07%.³ While San Francisco and Solano counties' timeliness rates were higher than the state's rate, counties must continue to maintain or improve their timeliness rates to stay in compliance with state and federal guidelines.

The Solano County Health and Social Services Department faced a situation in fiscal year 2023-2024 in which its processing timeliness rate declined. Much like the San Francisco Human Services Agency, it has faced turnover among eligibility workers and other integral staff, like clerical staff. This, coupled with a growing caseload since the pandemic, and an inflexible case assignment system for intake appointments, resulted in a backlog of cases that hindered their ability to maintain timely processing. In response to fluctuating staffing levels and the

limitations of the previous case assignment model, Solano County researched different approaches to scheduling staff functions and client appointments. They had to research methods to not only improve their application processing times but also consider the integration of CalWORKs applications, a new process for eligibility workers that would add to their workload at the time.

Block Scheduling Model

Solano County focused its research on scheduling models for staff that would help increase the number of appointments they could assign to workers, in addition to the CalWORKs intakes they would assign as part of the integration at the Vallejo office. Solano County divides its eligibility workers between intake, who handle applications, and continuing, who handle their ongoing, active cases. In their original business process, each intake worker was assigned one CalFresh case per hour, with a maximum of 4-6 cases per day, depending on whether workers were assigned a CalWORKs application. This process restricted the number of appointments that could be scheduled and assigned to workers in a day. This scheduling model proved inadequate for various staffing levels, leading to backlogs and delays in processing.

Solano County researched different scheduling models from various counties. They ultimately decided on a block scheduling model for their staff, taking certain aspects of the business processes from different counties to create a hybrid model that would work for them. Managers, along with the supervisory team, reviewed different components and decided what was most feasible for Solano County. The block schedule would divide the eligibility worker's day into blocks where they would be assigned either CalFresh or CalWORKs intake applications and integrate a processing time for Medi-Cal applications. The leadership team decided to pilot this block schedule in their Vallejo office in August 2024. Before launching the pilot, the Intake Bureau took a combined approach to reduce the backlog of overdue applications it had at the time. Once the majority of the overdue applications were processed, they piloted the newly designed scheduling system to maintain the level of productivity to avoid having a backlog in the future.

The leadership team established a scheduling framework based on two-hour appointment blocks. Two primary schedules were developed to structure the afternoon differently. In the first schedule, appointment blocks were set from 8:00 a.m. to 10:00 a.m., 10:00 a.m. to 12:00 p.m., and 1:00 p.m. to 3:00 p.m. The remaining two hours of the day were divided into two one-hour blocks—one dedicated to Medi-Cal application processing, and the other reserved for general task processing.⁴ The second schedule accommodated CalWORKs appointments in the afternoon. It retained the two morning blocks from 8:00 a.m. to 12:00 p.m., scheduled Medi-Cal processing from 1:00 p.m. to 2:00 p.m., and introduced a third appointment block from 2:00 p.m. to 4:00 p.m. The day ended with a one-hour general processing block from 4:00 p.m. to 5:00 p.m. A third schedule was created that mirrored the second but allowed for the assignment of two CalWORKs appointments in two blocks. This third schedule is adopted one week per month.⁴

Each two-hour block has a designated number of intake appointments assigned to it. A CalFresh block has three appointments assigned to the eligibility worker. The CalWORKs block has one appointment assigned. The Medi-Cal processing time was given as an hour. Medi-Cal cases are assigned to the eligibility workers on a rotational basis as applications are submitted. This one-hour time slot for Medi-Cal remains flexible and may be switched to a CalFresh appointment when necessary. The appointment notice issued to clients explains that they have a flexible appointment window in which the county will contact them. This provides the worker with the time to process applications by allowing them to move on to the next client when one is unavailable or unresponsive. In total, eligibility workers are assigned six CalFresh applications and one CalWORKs application per day. During the week they are on the third schedule, workers process three CalFresh applications and two CalWORKs applications.

When determining how many cases to assign per scheduling block, Solano County closely examined its appointment *no-show* rate and worker availability information. The data showed that between 26-30% of clients missed their scheduled CalFresh appointments.⁴ Based on both these components, Solano decided to assign three CalFresh appointments per block. This was an increase of approximately 30% of the number of CalFresh cases previously assigned to an eligibility worker.⁴ While this number took into account the potential no-shows, the leadership team also recognized that workers might not always be able to complete all three appointments due to time constraints or unforeseen issues. To address this, an Overflow Log was implemented, enabling staff to document any uncompleted appointments. This solution helped alleviate one of the main concerns workers had about the new scheduling model, which was being unable to complete their appointments.

In addition to revising the workers' schedules, Solano County introduced additional staff roles to support the block scheduling. One new role, "Worker of the Day," was implemented as part of this updated business process. Two existing roles, "Floaters" and "Screeners," were maintained with slight upgrades to their previous duties. These positions functioned as backup support to ensure continuity of service. Screeners primarily focused on evaluating CalFresh applications for entitlement to Expedited Services, and CalWORKs applications for Immediate Need services. The Floater role was designed to support absent intake workers or to handle the CalFresh appointments that were entered in the Overflow log. Meanwhile, the Worker of the Day provided in-office assistance to clients with general questions or those who lacked access to a phone.

The new block scheduling approach introduced a more flexible and efficient method for case assignment. By grouping related tasks into designated blocks of time, eligibility workers were able to handle additional cases while also allowing sufficient time for processing and reviewing each case. This innovation resulted in a significant reduction in appointment delays. The office successfully maintained its appointment availability after the backlog was eliminated. The flexibility of the model allows for updates to which type of application is assigned during the block, based on fluctuating application levels. When there is higher demand and applications in one program, a block can be designated to assign that program's applications. Moreover, the system allowed for better management of fluctuating staffing levels, ensuring that the number

of appointments could still be maintained within a 1-2 day window, regardless of staff availability.

The implementation of block scheduling has proven to be an effective strategy, significantly enhancing productivity and improving the timeliness of service delivery at the Vallejo office. Due to its success, the pilot was expanded to the rest of the bureau. Before adopting this structure, data showed that the bureau can process approximately 1,708 CalFresh applications and 610 CalWORKs cases per month—figures that did not account for a Worker of the Day.⁴ When the leadership team evaluated the feasibility of adding a Worker of the Day under the previous scheduling model, they found it would reduce overall scheduling capacity, limiting monthly case assignments to around 1,498 CalFresh cases and 539 CalWORKs cases.⁴ However, since launching the block scheduling pilot, the Intake Bureau increased its capacity to approximately 2,247 CalFresh cases and 535 CalWORKs cases per month, demonstrating the model's efficiency.⁴

Managing Change and Staff Engagement

An essential component of the planning process for Solano County's block scheduling pilot was proactive staff outreach and engagement, ensuring that employees felt heard and that their concerns were thoughtfully considered. The decision was made to test the pilot program at the Vallejo office, which featured a wide range of worker performance levels. This location included both one of the highest-performing units and one of the lowest-performing, the latter of which had among the highest rates of overdue cases. As such, the Vallejo office provided a more realistic environment to assess the model's long-term sustainability. From the outset, the leadership team emphasized the need for change and encouraged staff to approach the pilot with an open mind. Gaining staff buy-in was critical to the pilot's success, and channels for regular feedback and communication were established.

The communication strategy employed by the Vallejo office was solution-oriented, emphasizing collaboration and encouraging staff to contribute recommendations for improvement. Recognizing that the pilot's success depended on active staff involvement, the leadership team invited the labor union to participate in a bureau meeting. This meeting explained both the why and how they were involving staff, while also reinforcing transparency around the pilot's guidelines. Leadership expressed their openness to feedback and adjustments as needed to support long-term sustainability. Staff concerns and suggestions were taken seriously, and the pilot process was updated accordingly. The overflow log was one example of the staff recommendations that were incorporated into the pilot. Another example was updating the process for how cases in the overflow log were assigned, taking a direct staff recommendation to have workers assign the cases to themselves. Built-in processing time as part of the pilot schedule was another example of addressing staff's concerns about having enough time to work on the extra number of cases they are assigned.

Regular meetings were another key strategy used by the Vallejo office to support the pilot. Management recognized the different strengths and supervisory styles of the two supervisors involved in the pilot and determined that holding joint unit meetings would help ensure

consistent messaging to all staff. The manager actively participated in these meetings and invited staff to share their recommendations regarding the pilot. She consistently emphasized options for feedback, which included reaching out to her directly with feedback or suggestions for improvement.⁴ While an email account was created for staff input, the manager noted that it was not widely used. Given the limited engagement via email, she concluded that in-person meetings were a more effective way to foster communication. As a result, the pilot became a standing item on meeting agendas. In addition to attending unit meetings, the manager also gathered feedback through regular supervisory and one-on-one meetings.⁴

As the pilot progressed and was updated based on staff recommendations, the overall response from employees was positive. Although they were processing a slightly higher volume of applications, staff reported that the structure provided by the block scheduling model increased flexibility and enhanced their productivity. Many expressed that they felt more supported and had begun to regain trust in the process. With the pilot's success and decision to expand the model to its other buildings, the leadership team prepared its communication plan. During this preparation, the leadership team asked the original pilot eligibility workers to voluntarily share their experiences. As a result, a diverse group of staff members, along with one supervisor for support, volunteered to create a presentation and speak at the next bureau meeting. Importantly, all content was developed by the workers themselves and reflected their genuine perspectives on the pilot.⁴ The presentation was overwhelmingly positive and served as a source of reassurance for staff in other buildings, as it came directly from their peers. The pilot was expanded to the rest of Solano County's Intake bureaus on March 17, 2025.

Recommendations for San Francisco

San Francisco County's Adult Assistance Programs (CAAP) has had a continuously growing caseload, especially since the COVID-19 pandemic, and has also faced backlogs in appointment scheduling. Many aspects of the block scheduling model could improve the appointment backlog, but they would need to be evaluated for how they could be adopted in San Francisco. Adopting this type of scheduling model in CAAP would mean restructuring the functions and roles of the eligibility workers. Currently, CAAP has a combined function model, which means eligibility workers perform intake duties but also have a continuing, or carrying, caseload. This is one of the major differences between Solano County and San Francisco that could affect the implementation of a block scheduling model. Other differences that hinder implementation of a similar model are the size of the program compared to the Vallejo office and the number of functions Eligibility Workers perform in San Francisco. There are steps, though, that CAAP could take to evaluate the feasibility of adopting a similar block model.

Review application processing data: CAAP must review data on monthly application submissions and monthly appointment capacity based on staffing. Data would also be needed on the actual number of applications eligibility workers approve or deny in a given month. This would assist in obtaining a no-show rate for phone applications, as limited data have been collected on this rate.

Split the Intake and Carrying sections: CAAP could evaluate the feasibility of splitting the eligibility workers between an intake and a carrying section. This would require an assessment of several factors.

1. Vacancy rates: Any pilot or process change should be done when CAAP has a minimal vacancy rate. Piloting the block schedule with split intake and carrying sections would not require additional funding, as we would be filling positions already budgeted and accounted for. The block scheduling model would not require additional positions to be funded.
2. Project mapping: Data should be collected on anticipated projections of the number of potential appointments assigned to staff. A comparable analysis of current data would be needed in addition to a comparison to application submission data to evaluate if and what the percentage increase in productivity would be.
3. Function schedules: Vallejo and CAAP share similarities with the eligibility worker roles. Their Worker of the Day and Floaters functions are comparable to CAAP's Service Counter and Duty Worker functions, respectively. The main difference is the scope at which we assign these functions. CAAP needs to evaluate how we would continue to staff these functions and how their roles would change.
4. Caseload data: A review of CAAP's active caseload size and how it would impact staff if distributed among only one section of the eligibility workers.

While it would be a big undertaking, splitting the intake and carrying sections would be beneficial for CAAP staff. The split would help maximize the work in intake and in carrying by having workers focused on one aspect of a case's cycle. If CAAP were to integrate block scheduling and split the sections, it could maximize the number of intakes scheduled. It would be beneficial for CAAP's carrying section to reduce the error rate and ensure timely processing of action on cases, potentially reducing the number of over-issuances to clients.

Updated appointment scheduling: Adopting block scheduling would shift CAAP appointments from set appointment times to flexible scheduling blocks. Further detailed examination is needed to determine the demand for in-person appointments vs phone appointments and how practical block scheduling would be.

Conclusion

Solano County has made great progress in maintaining its application processing timeliness. It was a collective effort, not only between management, supervisors, eligibility, and clerical staff in Vallejo, but a division-wide effort. The block scheduling pilot demonstrated success not only for processing goals but also for staff sentiment and morale. CAAP could benefit from adopting a block schedule and using a collective approach to decrease appointment backlogs and maintain appointment scheduling within a reasonable window of time. Although it would require extensive analysis, it is a study worth doing to build a sustainable business process model that is adaptable to fluctuating circumstances.

Acknowledgments

The Executive Development Program with BASSC has been a great opportunity and learning experience for me, and I am truly grateful to all those who have made it possible for me to participate. I would like to acknowledge and thank Solano County's Vallejo office for hosting me and giving me the opportunity to study their business practices. A special thanks, in particular, to Diana Hernandez for being so gracious with her time and for the great conversations. Within San Francisco County, I would like to extend my gratitude to the executive team and my director for allowing me the opportunity to participate in BASSC and invest in my professional development. I would also like to thank our liaison, John Murray, for their guidance and support. I would also like to extend my thanks to Andrea DuBrow and the entire BASSC team for all their support in navigating EDP and creating such a great and engaging curriculum.

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