road test Work Plan 2

County Case Flow

This flow chart describes how clients move through County’s CalWORKS program.

County has an efficient intake process during which a one page

assessment (P3) is utilized to triage all cases during orientation and make

assignments to specialized case manager/workers based on readiness

to work, crisis management, and special initiative programming.

Work Plan

This work plan describes which of the CalWORKs 2.0 resources and tools will be integrated into County’s program, how and when the integration will happen, and who will be involved. It also lists next steps.

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|  | CalMAP | Resource Map | 24 Month Counter | Goal Setting Tools |
| What | Client- Empty  Worker- With words | Electronic – central drive |  | My Roadmap and Potholes and Detours  Goal/Plan/Do/Review-Revise (GPDR) |
| When | During/as part of OCAT assessment  Possibly with a few ongoing clients  As needed for reassessment of WEX clients | OCAT  Re-assessment  Check-ins |  | Orientation: Intro to GPDR  Emp Workshops: Regular GPDR  New Workshop: Goal Setting  Vision board- roadmap- GPDR  (Week 4 – Monday- 1hour)  Wex/ E2 Lite- Start and daily |
| Who-  Staff and Clients | - 10 clients  - 10 clients  – 10 clients  – 10 clients  – WEX ? |  | Melinda | Orientation:  Workshops:  Goal Setting workshop:  Use GPDR with FSP cases weekly  Wex: |
| How | Client have blank copy during the OCAT and able to make notes/circle location during the assess.  OR Complete at the end with the worker | As needed | Case study for subset of cases with discrepancy | Introduce concept in the orientation and set one goal. Periodically check-in at start of regular employment/readiness workshops to repeat. Add new workshop for Goals/Vision Board  FSP clients during regular weekly check-ins |

Road Test Process

A “road test” is a systematic approach to gathering feedback from staff and clients about the new tools and processes developed for CalWORKs 2.0. The purpose of the road test is to understand what is working well and what is not. A typical road test cycle will involve 3-4 staff working with 5-10 clients each for 4-6 weeks. Feedback will be gathered along the way and analyzed to identify promising practices and targeted adjustments. Based on feedback, the strategic initiative team will revise tools and processes, then test them again through a second road test cycle. All road test feedback will strengthen CalWORKs 2.0 before roll-out statewide. We will work with the county to identify learning questions of interest to both the strategic initiative team and the county itself, and discuss the best methods for collecting that information. Typically, that involves a worker questionnaire, client survey, interviews or focus groups and peer observation. A draft schedule below reflects a typical road test with those sources of feedback in mind.

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| --- | --- | --- | --- | --- | --- |
| Process/Activities | April 2017 | May 2017 | June 2017 | July 2017 | August 2017 |
| Technical assistance from strategic initiative team |  | **Ongoing** | **Ongoing** | **Ongoing** |  |
| Staff training | **Counselor**  **In person** |  | **Counselor**  **Webinar** |  |  |
| CalWORKs 2.0 tool implementation | **Ongoing** |  | **Ongoing** | **Supervisor** |  |
| Feedback: Interviews or focus groups with staff |  | **Supervisor** |  |  |  |
| Feedback: Worker survey (each client meeting), peer observation (1-2 meetings) |  | **Implement** | **Plan** | **Focus group**  **Implement** |  |
| Participant focus group |  | **Focus group** |  |  |  |
| Check-in teleconference with county | **Plan** |  |  |  |  |
| Review data and revise tools/implementation |  |  | **Analysis** |  |  |

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|  | **What** | **When** | **How** |
| **Group A-**  **Job Readiness**  **(4 weeks)** | Orientation | 4/11, 4/13, 4/18 | Introduce Goal. Plan, Do Review via slide   * Clients to “try out” G, P, D, R * Quality of Life Assessment (Pre) |
| OCAT | 4/11, 4/13, 4/18 | Complete OCAT and CalMAP   * Tools (My G, P, D,R) * CalMAP (empty –client and full-staff) |
| Job Readiness | 4/24/17-5/4/17 | Daily Check-in   * Tools – First session: MY GPS * Daily GPDR |
| Workshop | 5/10/17 | Goal, Plan, Do, Review Workshop   * Vision Board |
| Post Assessment |  | Review CalMAP to assess progress  Quality of Life Assessment (Post) |
| **Group B-**  **Assigned to Counselor**  **(3-6 months)**   * **Employed** * **School** * **Family Stabilization** | Orientation | 4/11/2017 | Introduce Goal. Plan, Do Review via slide   * Clients to “try out” G, P, D, R * Quality of Life Assessment (Pre) |
| OCAT | 4/11/2017 | Complete OCAT and CalMAP   * Tools (My GPS, My G, P, D,R) * CalMAP (empty –client and full-staff) |
| Progress Checks | Weekly for 3-6 months | * Send check-in emails to assess status of action plans * Schedule to attend Workshop as time allows |
| Re-Appraisal | 3-6 months | Review CalMAP to assess progress  Quality of Life Assessment (Post) |
| **Group C-**  **WEX/E2Lite**  **(1 month)** | Orientation | 5/1/2017 | Introduce Goal. Plan, Do Review via slide   * Clients to “try out” G, P, D, R * Quality of Life Assessment (Pre) * My GPS |
| Workshop | 5/10/17 | Goal, Plan, Do, Review Workshop   * Vision Board |
| Progress Checks | 5/1/17-5/30/17 | Daily Check-in   * Daily GPDR – possibly in small groups- oriented to WEX activities |
| Post Assessment |  | Quality of Life Assessment (Post) |

Learning objectives

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| --- | --- | --- |
| Strategies: What we will do | Targets: What we will change  (attitudes, behaviors, skills) | What success will look like |
| 1. Introduce goal setting as part of orientation  2. Infuse and reiterate goal setting regularly as part of one-on-one and group check-ins; emails with GPDR templates  3. Deliver goal setting/vision board workshop as part of job readiness workshop series  4. Integrate CalMAP into assessment and re-appraisal process | 1. Understanding that failure is a part of the process, thinking differently about how goal setting works – and that the effort of “trying” is a success.  2. See concrete steps to obtain goals. Understand an explicit pathway to break goals into small steps as a way to make and demonstrate progress. Celebrate goal achievement.  3. Believe that successful goal achievement is possible. Generate life goals (short-term and long-term) and actively take steps toward achievement.  4. Build understanding of resources and teach about options that are available. Look more holistically at situation. Build the conversation about programs that help with areas of needs – increase communication and openness about the areas of need. Build on areas of strengths or thriving – encouragement. | 1. Increased engagement, more connections, more individualization and more autonomy.  2. Less noncompliance, more engagement, convey that workers are really here to help and are motivated by client success. Create buy-in.  3. More open to sharing and to asking for help. Empowering clients to believe that success is possible.  4. Less people requesting exemptions because they are more engaged. Visualize progress – for clients, workers and management. Provide quantification of progress/success. |

Feedback structure and schedule



