



Using SAWS Data for Program Management

Webinar #5

Presenters: Yunny Tai, San Francisco County; Ed Cuellar, Stanislaus County;
Anita Suarez, Tulare County

Facilitated by: Natasha Nicolai, Mathematica Policy Research; Kathy Gallagher,
Contra Costa County

October 11, 2017 2:00 – 3:00 p.m. PT

Welcome!



Kathy Gallagher

**Executive Director, Employment & Human Services Department
Contra Costa County**

Welcome and Introductions



Natasha Nicolai

Mathematica Policy Research

Project Director, CalWORKs Strategic Initiative

Webinar Series

This fifth webinar is designed to highlight innovative practices from three counties. Representatives from each county will share their successes and challenges in using data to help supervisors and case managers make decisions to guide program activities and engage customers.

The last webinar in the series will also feature three counties, who will each share the strategies they use to help families stay engaged.

Webinar Wednesdays - 2 p.m. PDT	
Today	Using SAWS Data for Program Management
October 25	Strategies to Help Families Stay Engaged

During This Webinar, We Will...

- Highlight the stories of three counties that are doing innovative work around program management using SAWS data
- Reflect on what you find especially interesting or useful about the counties' use of data
- Identify commonalities across the presentations that lead to ideas for future work with data

Questions and Reflections

- You can ask questions or post a comment during the presentations and after each one. Use the Q&A box anytime.
- Reflective comments are welcome—those that start with “I think,” “I know,” “I believe,” etc.
- Presenters will respond to your questions during the webinar as they can. All questions and answers will be posted on the website after the webinar.
- At the end of the webinar, we will ask you to comment on cross-cutting strategies you observe or offer recommendations for counties.

Poll Question – Who Is Here Today?

Choose the option that best describes how you interact with data:

- I manage data systems for my county.
- I use data to make program decisions.
- I input data.
- I use data to guide my daily work activities with customers.
- I don't work with data, but I am interested in learning what others do.

Needs Assessment, June 2016

Data Quality

- Reports not useful in guiding staffing or program management decisions
- Data system not reliable

Resources

- Data management demands a lot of county staff and resources
- Some staff create their own systems

Metrics

- Misalignment of federal and state requirements
- Local control of selecting and applying core performance measures



Yunny Tai

Administrative Manager

Welfare-to-Work Services Division

San Francisco Human Service Agency

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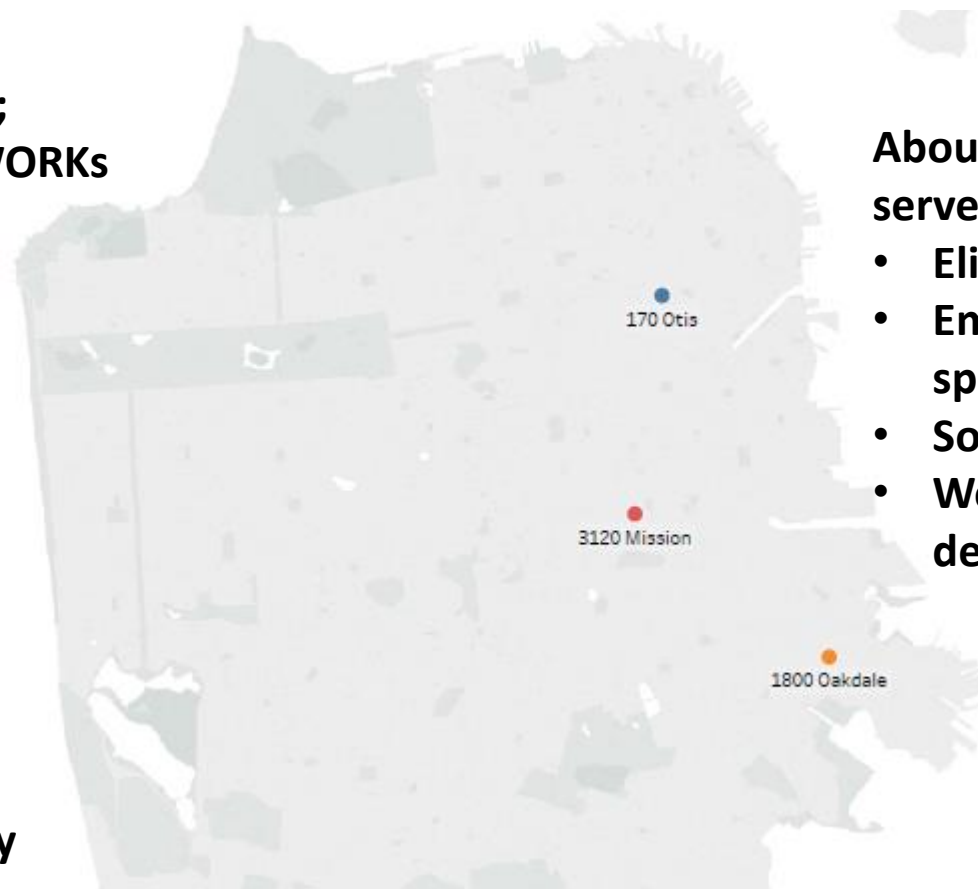




**10 HSA offices;
3 serving CalWORKs
clients**

**About 3,400
CalWORKs families**

A CalWIN county



**About 300 staff who
serve CalWORKs families**

- **Eligibility workers**
- **Employment specialists**
- **Social work specialists**
- **Workforce development staff**

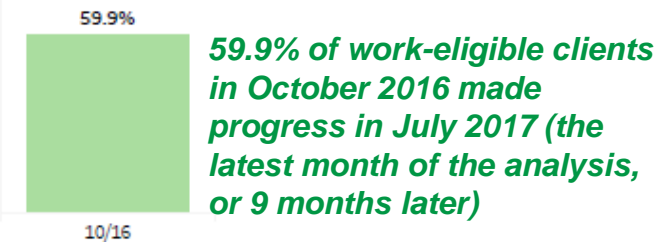
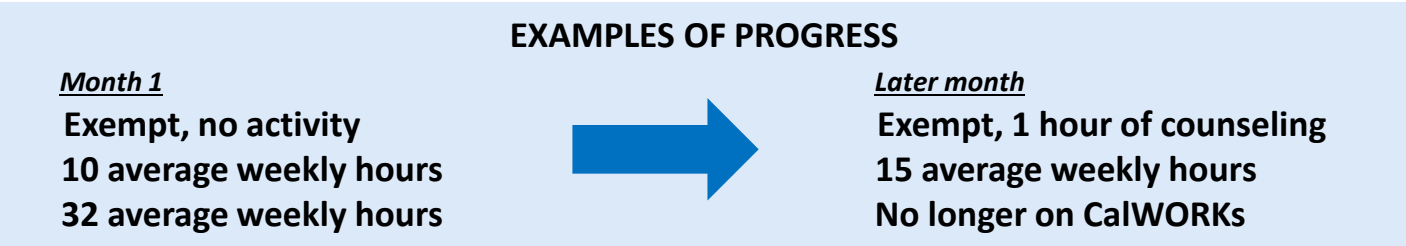
No Answers to Most Important Question...Until Now!



To what extent are our Welfare-to-Work clients moving toward self-sufficiency?

Client Participation Improvement (CPI) Rate

The percentage of families who made progress from one month to another



3. Client Participation Improvement (CPI) (3-Month Progress)	Apr 17	44.9%
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44.9% of work-eligible clients in April made progress 3 months later (in July)

The Technical Challenges & How We Addressed Them



What does progress mean? And how do we measure it?

There are so many data (multiple client statuses, activities in a month). This yields **VERY MESSY** data files.



Created a hierarchy of statuses. If moved from a lower to a higher-level status in a later month, the client “made progress.”

<u>Value</u>	<u>Status</u>
1	Sanction
2	Noncompliance
3	Exempt
4	Exempt participating
5	Not participating (not exempt, sanctioned, or in noncompliance)
6	Partially participating
7	Met state WPR
8	Met federal WPR
9	Discontinued


Boiled down data from each table in the Employment Services sub-system to one record per client/case. It became easy to merge the files.

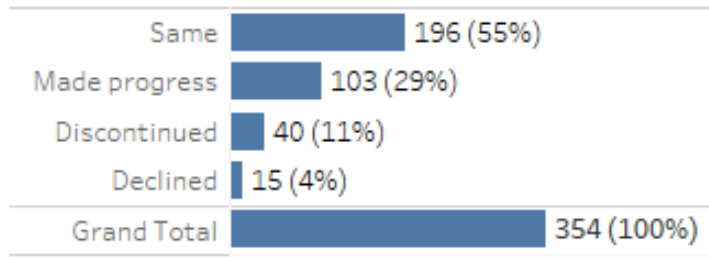
- Summing hours in a month; yes/no fields; choosing the best one (hierarchy, most time, most hours); transposing rows and columns

Created a work-eligible indicator as the basis of the WtW population, primarily from eligibility-side data fields (more reliable)

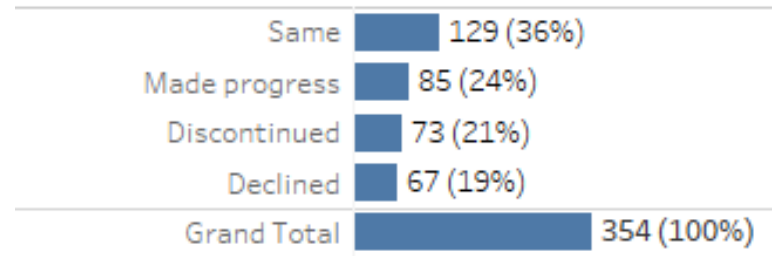
Successes

Deeper Insights

Cases that Were Exempt January 2017 
3-month Progress



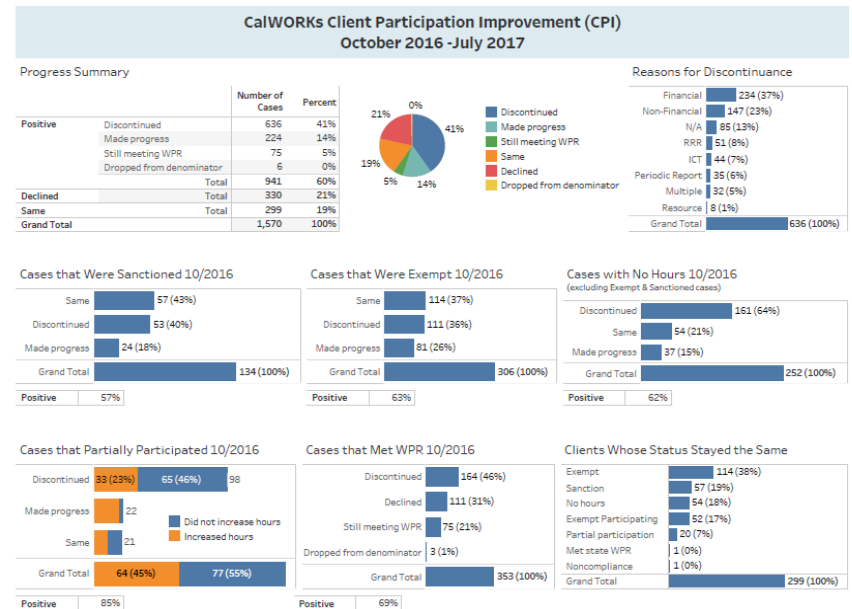
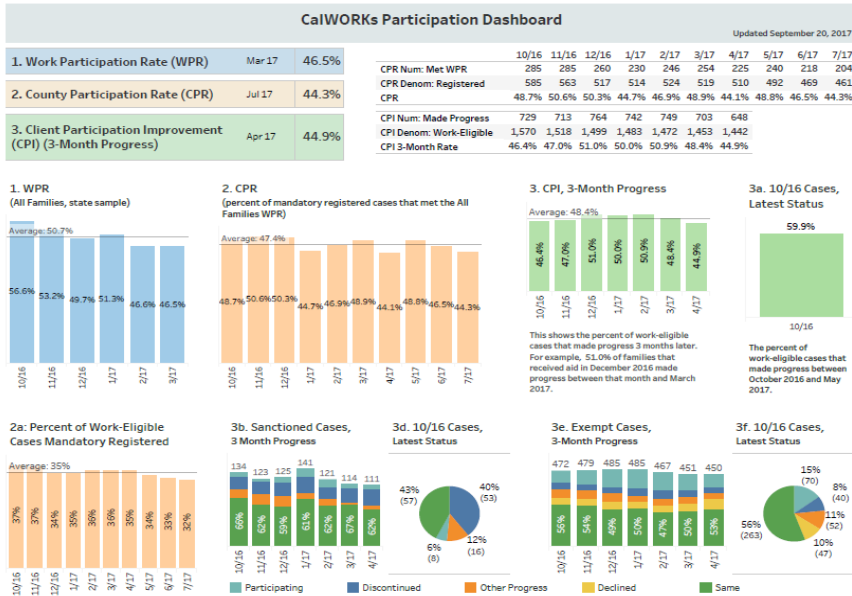
Cases that Were Exempt January 2017
Latest Month Status *7-month progress*



It looks like we're having some success in moving exempt clients to engagement. However, some appear to wind up in noncompliance or sanction. Is this a concern? If so, what can we do to prevent this?

Successes

Additional Performance Measurement Tools, Beyond WPR



Cool data analysis tools can create these dashboards in minutes!

Lessons Learned & Next Steps

- Build up gradually, as analysts gain more knowledge/skill in working with CalWIN data & manipulating data
- CPI now an agency performance measure, monitored monthly, along with WPR. Still in an early phase of trying to understand “what it all means.”
- Staff are starting to say “This will increase our CPI”!
- In line with our organization’s goal to help clients move toward self-sufficiency. More in line with employees’ internal motivation.
- Incremental progress is recognized.
- Now we have a longitudinal data file to do more research & analysis:
 - Hone in on specific populations
 - Study progress outcomes for different activities/services
 - Experimental testing (e.g., test whether one method is better than another for encouraging sanctioned clients to cure their sanction)

Comments and Questions

Take a moment to think about what you just heard.

What sticks out to you?

What do you find especially interesting or useful about the data management strategy presented?

Post your comment in the Q&A box. We will highlight some comments at the end of the webinar.

Post any questions you have for the presenter in the Q&A box.

Stanislaus County Community Services Agency

Ed Cuellar

Welfare to Work Coordinator
Community Services Agency
Stanislaus County



Kelly Alvarado

Family Services Supervisor
Community Services Agency
Stanislaus County



Introduction

- **The Community Services Agency (CSA) operates social welfare programs that provide assistance, direct client services, and support for the benefit of the community**
- **CSA has more than 1,100 employees and provides access at eight county satellite offices**



Lack of Affordable Permanent Housing

- Average median rent \$1,495.00
- Temporary housing vs. permanent housing ratios were upside down
- Create more housing opportunities
 - Landlord engagement
 - Intensive case management
- Data collection system

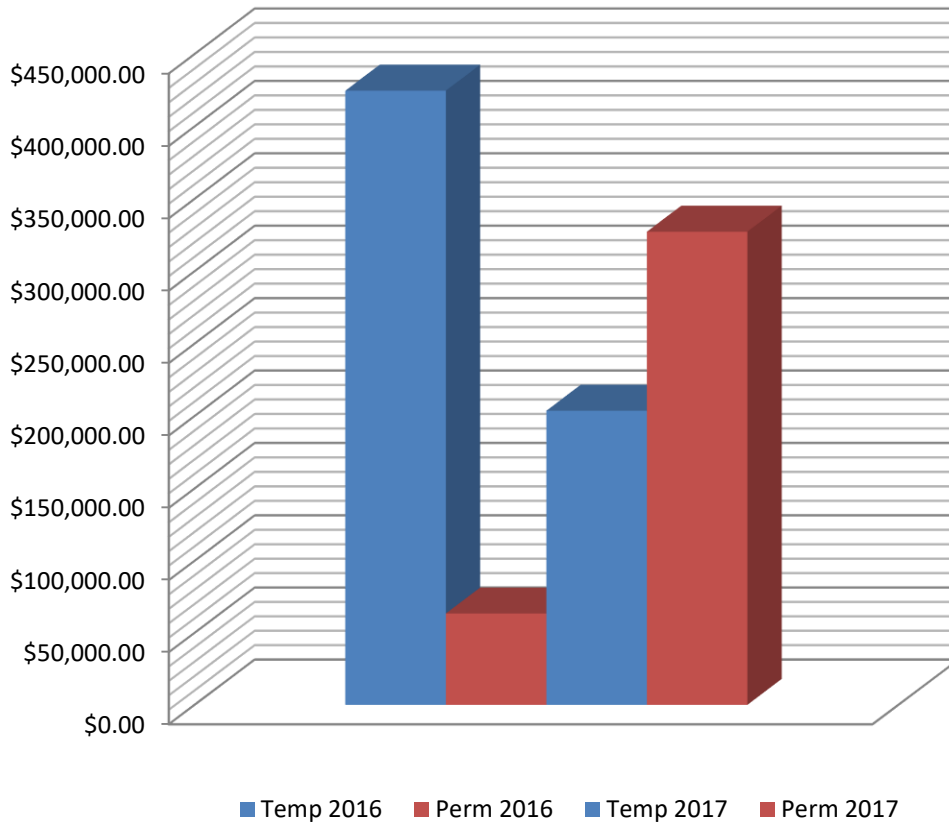


Challenges Faced

- **Lack of affordable housing**
- **Where do we start?
What steps should we take?**
- **Staffing, training,
data collection**



Results



- **Landlord engagement works!**
 - Temporary vs. permanent housing ratio reversed
 - Small network of landlords are exclusively working with our agency
 - Housing Education Workshops

Lessons Learned & Next Steps

- Landlord engagement is a vital piece in finding solutions to the homeless problem we face
- Prevention
- Intensive customer engagement and case management



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Tulare County Health & Human Services Agency

Anita Suarez

Unit Manager
Tulare County Health & Human Services



Roxanna Cruz

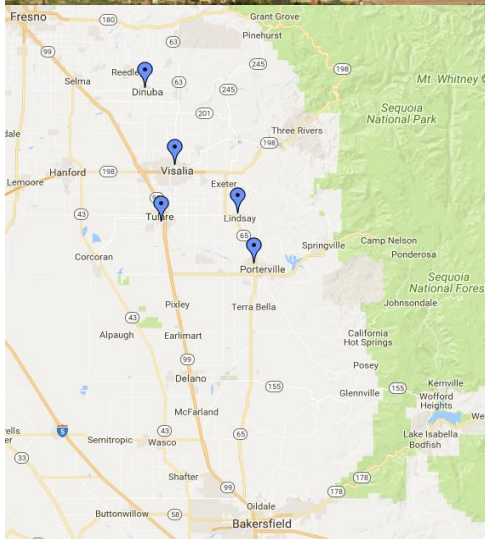
Program Specialist
Tulare County Health & Human Services



Tulare County Health & Human Services Agency

- **TulareWORKs**

- 5 district offices and 1 call center
- 102,450 combined households
 - CalWORKs: 12,123
 - CalFresh: 51,021
 - Medi-Cal: 100,174



CalWIN Data to WTW Calculator

The Employment Services (ES) Participants report lists assigned participants with summary statistics

Employment Services Participants - All Offices

Report run: 9/30/2016 11:11:09AM

Letters indicate which Column to enter date on the above Spreadsheet

Totals for HHS A	Mand	Vol	NoSts	Total
Total CalWORKs Active	C 6,164	302	30	6,195
CalWORKs Actv No ES	0	0	30 D	30
Closed	58	0	0	58
Curing Sanction	1	0	0	1
Deferred/GoodCause	E 603	3	0	606
Deregistered	1	0	0	1
Exempt	F 2,028	9	0	2,037
Non-Compliance	256	1	0	257
Post-Aid Services	23	0	0	23
Registered	2,069	288	0	3,256
Sanction	19	0	0	19
Timed-Out (Post Aid)	1	0	0	1
Timed-Out (Safety Net)	6	0	0	6
WW Ineligible	199	1	0	200

Participants with activity: 3,627	H
Participants with hours in previous calendar month: 1,297	M
Participants with Plan Signed Date: 2,402	R
Number of expired plans: 82	U
Exempt persons with Activity: 606	I
Exempt persons with hours in previous calendar month: 192	N
Exempt persons with Plan Signed Date: 352	S
Exempt persons with Expired plan: 14	V
Deferred/Good Cause persons with Activity: 450	J
Deferred/Good Cause persons with hours in previous calendar month: 207	O
Deferred/Good Cause persons with Plan Signed Date: 357	T
Deferred/Good Cause persons with Expired plan: 16	W
Number of expired Status Reasons: 461	

Excel Calculator

ES Participants Calculator for Supervisors

Participation Need Determination							Participants with Activities Determination					
Worker Number	Worker Name	CalWORKS Active (M)	CalWORKS Active (ES)	Deferred/Good Cause (Mand)	Exempt (Mand)	Total Plans Need	Participants with an Activity	Exempt persons Activity	Deferred persons Activity	Participants minus Exempt & Deferred	% with Activity	
L001	FTE1	51	0	3	8	40	47	5	3	39	97.5%	
L002	FTE2	80	0	7	20	53	60	9	6	45	84.9%	
L003	FTE3	48	0	2	9	37	39	3	1	35	94.6%	
L004	FTE4	45	0	1	7	37	40	2	1	37	100.0%	
Unit	L23	224	0	13	44	167	186	19	11	156	93.4%	

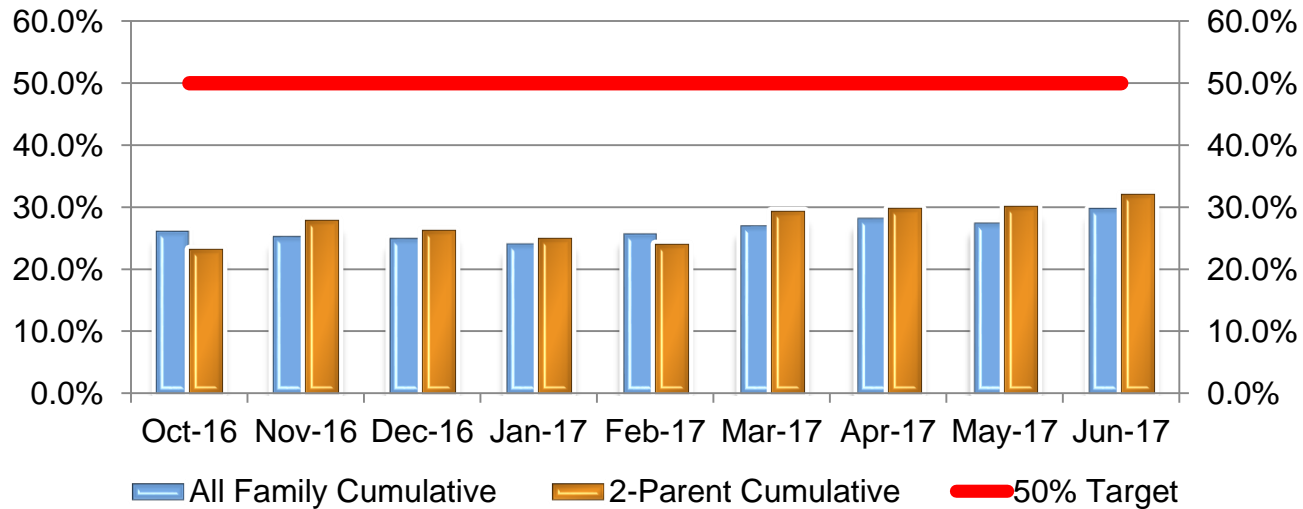
Participants with Hours Determination					Participants with Plans Determination							
Participants with hour prior month	Exempt with hours in prior month	Deferred with hours in prior month	Participants minus Exempt/Deferred	% with Attendance hours in month	Participants w/ a Plan Sign Date	Exempt person with p sign	Deferred person with p sign	Number of Expired Plans	Exempt Persons w/ Expired Plan	Deferred Persons w/ Expired Plan	with a valid Plan Sign Date	% with a valid Plan Sign
14	2	0	12	30.0%	18	2	0	1	0	0	15	37.5%
13	0	3	10	18.9%	35	3	3	3	0	0	26	49.1%
12	1	0	11	29.7%	21	1	0	1	1	0	20	54.1%
11	0	0	11	29.7%	24	1	0	0	0	0	23	62.2%
50	3	3	44	26.3%	98	7	3	5	1	0	84	50.3%

Performance Rating		
Weighted Average of Activity, Attendance Plan %	Unit Comparison	Performance Rating
40.1%	91.5%	Satisfactory
39.1%	89.1%	Satisfactory
47.2%	107.6%	Exceeds
51.4%	117.2%	Clearly Exceeds
43.8%		

Challenges Faced

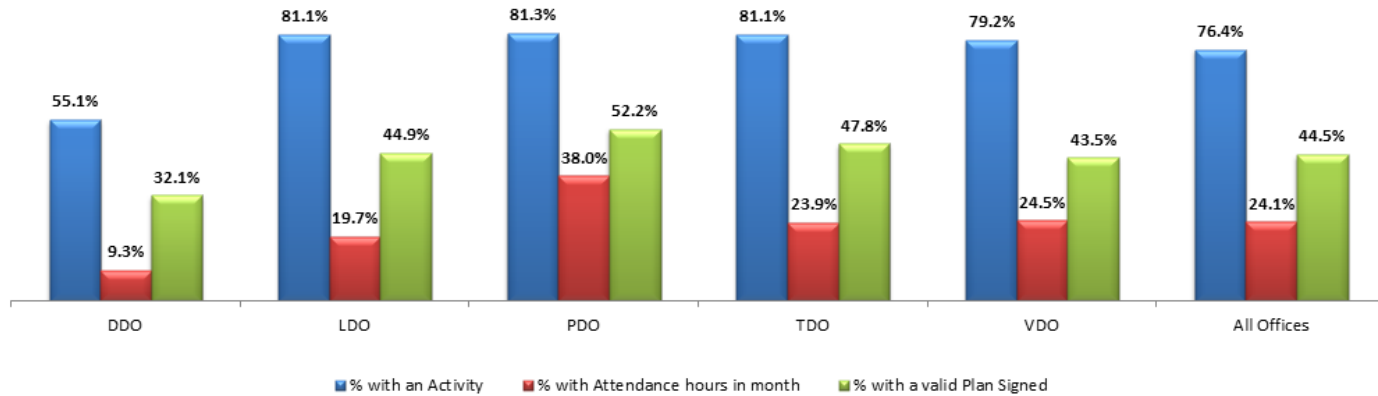
- Resistance from staff
- Questionable data
- Increasing WPR

Tulare County WPR

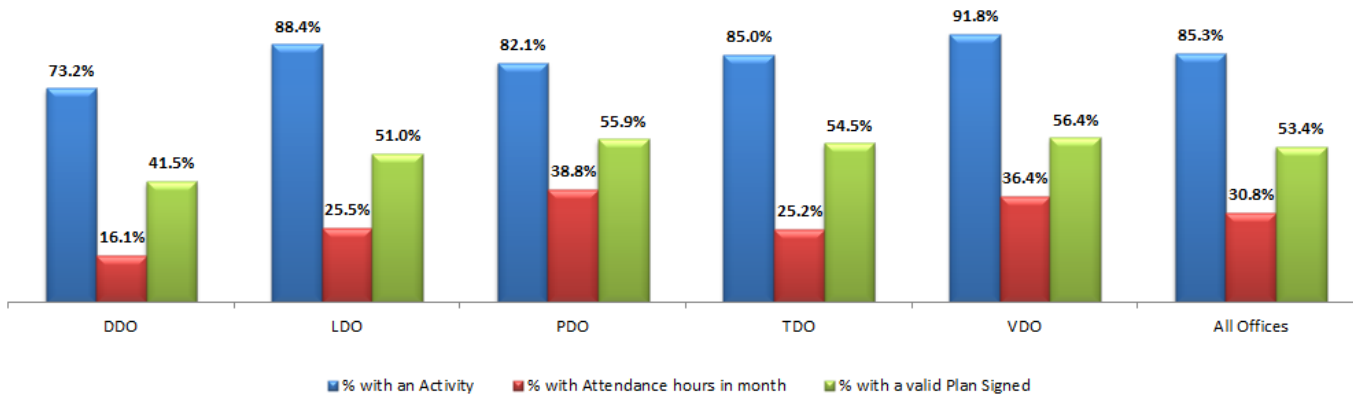


Successes

Employment Services Participants 2/2017



Employment Services Participants 8/2017



Lessons Learned & Next Steps

- Continuous progressive measurements
- Engaging staff with client goal achievements
- Increasing WPR
- Assessing individual client success

Comments and Questions

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Final Comments and Questions

Take a moment to read some of the comments in the pop-up box.

Think about the questions below and post a comment in the Q&A box.

What do the innovative practices from the three counties have in common?

What cross-cutting strategies did you identify?

What ideas do you have for counties?

What implications do you see for future advocacy on data?

Thank You!

- **Next webinar: October 25, 2:00 p.m. PDT**
 - Strategies to Help Families Stay Engaged
- **Website does not require a login, except for Forum**
 - www.calworksnextgen.org
- **Questions and answers and participant reflections from this webinar, plus video and slides, will be available on website home page**