CalWORKs 2.0 | Next Generation

Planning and Conducting a Road Test
Webinar #8

February 28, 2018 @ 2:00−3:00 p.m.

Facilitated by:

Lindsay Cattell, Mathematica Policy Research

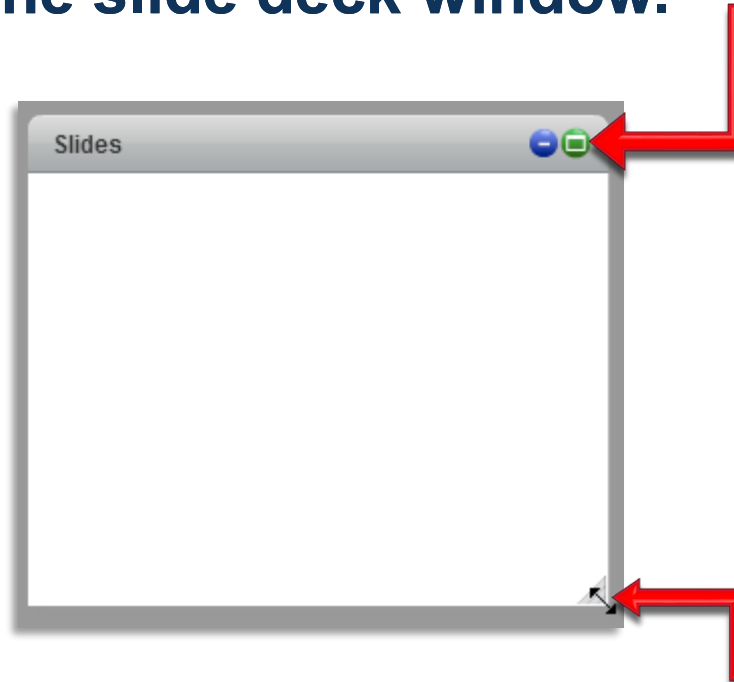Stephanie Oakley, Fresno County Department of Social Services

Veronica Rodriguez, Fresno County Department of Social Services

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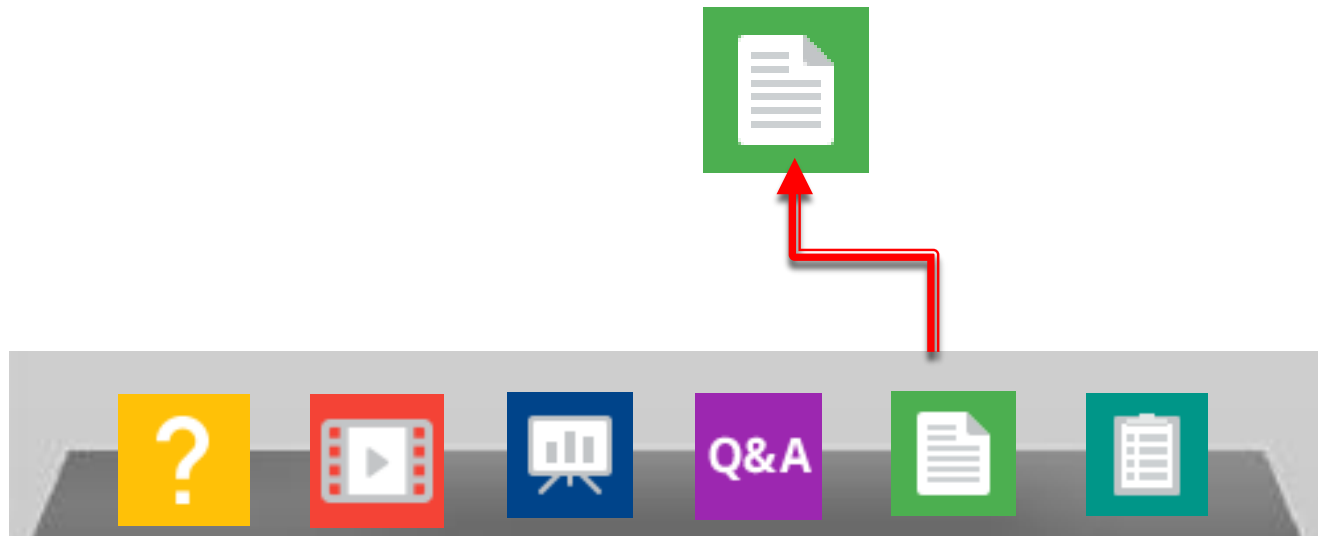
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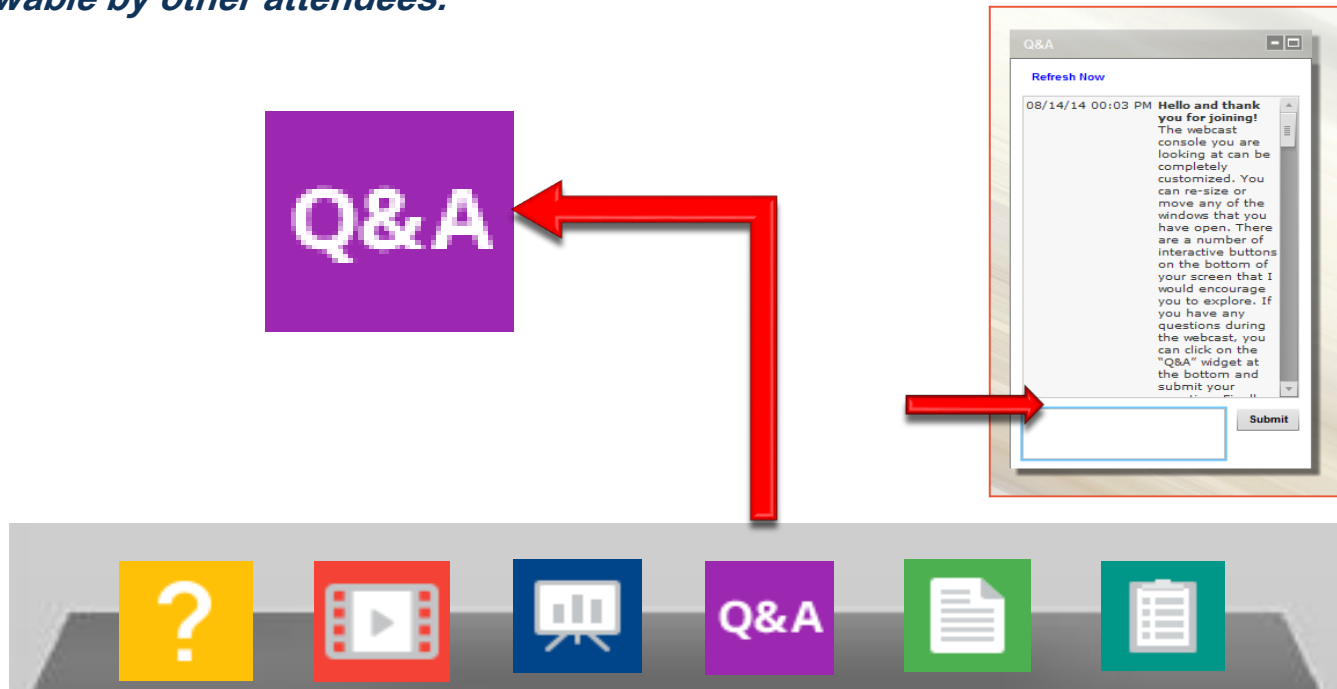
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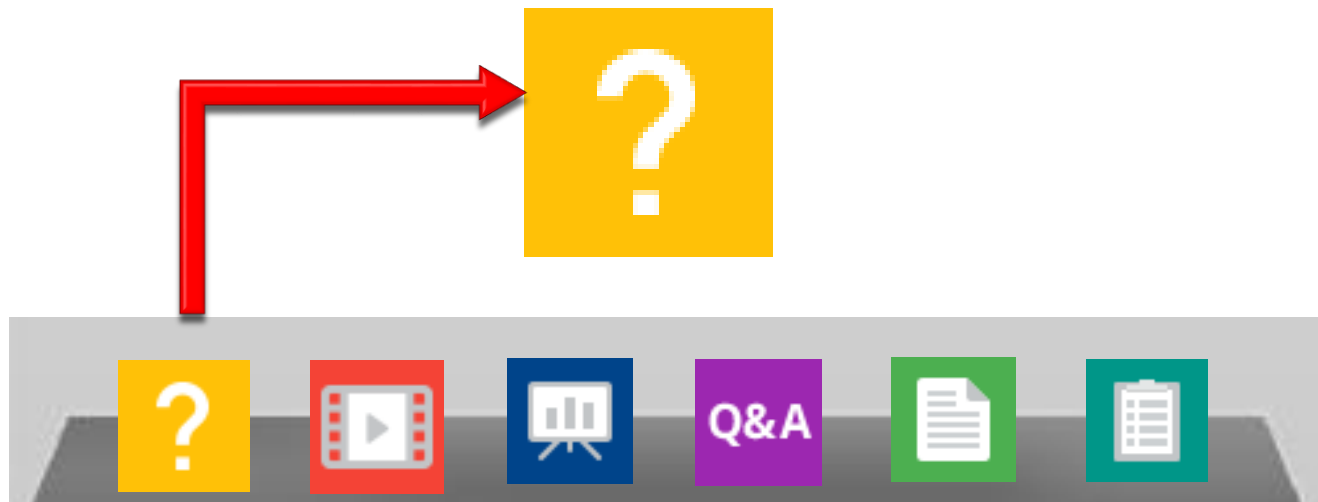
Welcome!

Lindsay Cattell

Mathematica Policy Research

Facilitators

Veronica Rodriguez

Fresno County Department of Social Services

Stephanie Oakley

Fresno County Department of Social Services

Goals for this webinar

- **Begin planning for a road test in your county**

- **Learn about Fresno's road test experience**

- **Learn about the supports that will be available to counties that conduct road tests**

Working webinar!

- **Be sure you already reviewed the first webinar on road tests! [Click here](#) to watch it any time**

- **We'll walk through the initial steps of planning a road test on this call**

- **Have participant packet (a.k.a. work plan) handy**
  - **Check the green resource list**
  - **Fill out the packet individually**
  - **After the webinar, meet with other staff in your county to compare ideas and make decisions**

- **Re-watch this webinar at any time or use the slides with your county**

- **Ask questions at any time!**

Question

- **What one word or short phrase sums up your county's previous experience with adopting new approaches?**

- **Write your answer in the Q&A box**

When to do a road test

- **You will be ready for a road test:**
  - **When you can articulate the strategies and tools you want to try out and *why* you think these strategies and tools will help**
  - **Think about what attitudes and behaviors the tools and strategies will change in the short term**

The road test

A subset of frontline staff (5 – 10)

working with

A few clients per staff (5 – 10)

trying out

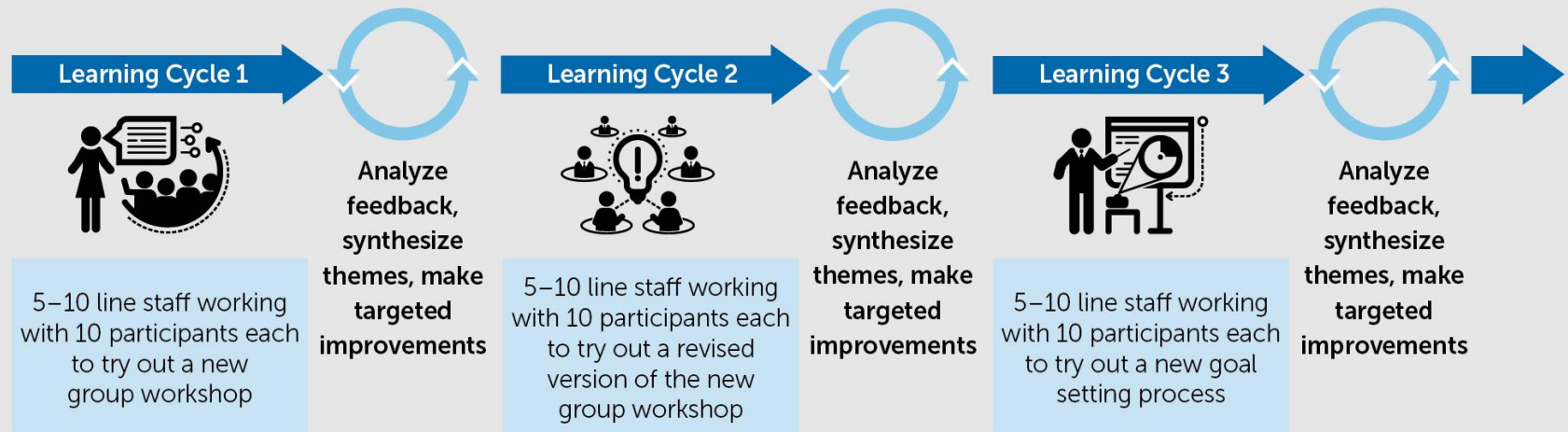**Select CalWORKs 2.0 strategies and tools**

providing

Targeted feedback about implementation

An example of the road test process

An example of the road test process

Learning Cycle 1	Analyze feedback, synthesize themes, make targeted improvements	Learning Cycle 2	Analyze feedback, synthesize themes, make targeted improvements	Learning Cycle 3	Analyze feedback, synthesize themes, make targeted improvements
5–10 line staff working with 10 participants each to try out a new group workshop		5–10 line staff working with 10 participants each to try out a revised version of the new group workshop		5–10 line staff working with 10 participants each to try out a new goal setting process	

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Road test steps

1. **Plan for a road test**

2. **Plan for data collection**

3. **Train and prepare staff**

4. **Conduct road test**

5. **Analyze data**

6. **Review data, revise strategies, and plan for the next road test**

Road test steps

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1. Plan for a road test

Initial work

- **Ensure all staff know the basics of a road test**
  - **Watch the first webinar on road tests**

- **Create a work plan**
  - **The participant packet IS the work plan!**
  - **During this webinar you'll have time to fill it out individually**
  - **After the webinar, meet with other staff in your county to compare ideas and make decisions**

- **Clearly describe the tools/strategies**

Fresno's tools/strategies

	Goal setting with clients: Goal-Plan-Do-Review/ My Roadmap/Potholes and Detours	CalMAP	Goal setting with workers: Goal-Plan-Do-Review/ My Roadmap/Potholes and Detours
When	Each monthly contact (Goal-Plan-Do-Review); after assessment plan (Roadmap/Potholes)	Initial interaction and follow-ups	Monthly meetings between program managers and supervisors, and supervisors and staff
Who – Staff and clients	Rural: 2 job specialists Metro: 3 job specialists Each staff person works with 6–10 clients of his or her choice	Rural: 2 job specialists Metro: 3 job specialists Each staff works with 6–10 clients of his or her choice	Rural: Program managers and 2 supervisors Metro: 3 program managers and 3 supervisors Supervisors will use 2–3 per frontline staff Managers will use with 2 supervisors
How	During in-person contacts with clients	Use at time they receive OCAT results (whether or not that staff person actually conducted the OCAT)	Managers work with supervisors and supervisors work with staff

Fresno's reflections

- **We opted to use ongoing job specialist staff to obtain the best outcomes, as they work with the general population**

- **Selected staff from both areas – metro and rural**
  - **Some processes differ; this gave us a better idea of how it would work best**

- **We also piloted the tools (GPDR and Roadmap) with supervisors and managers**

Fresno's reflections

- ## What worked well
  - Flexibility to customize the tools
  - Webinars – staff able to understand the why behind CalWORKs 2.0

- ## What we wish we knew before starting
  - We needed to develop clearer recommendations for staff on use of each tool

Clearly describe the tools/strategies

- **Example below; take a moment to fill out your table**

	Goal-Plan-Do-Review (tool)	CalMAP (tool)	In-person meetings (strategy)
What	Short-term goal-setting tool for use with customers	Tool for quickly assessing a customer's current situation	Meeting monthly with customers in person
When	During every interaction with customer during road test	During OCAT assessment	Monthly
Who – Staff and clients	5 staff members in each office Each staff member works with 3–5 customers of his or her choice	3 staff members Use with 10 different customers during the road test	5 staff members in each office Each staff member works with 3–5 customers of his or her choice
How	Staff member will approach customer with tool; customer can refuse to participate	Introduce and give CalMAP to customer before OCAT, conduct OCAT, ask the customer to fill in the CalMAP, then have a conversation with the customer about his or her current circumstances	Ask customer to attend meetings in person; call customer before meeting as a reminder
Next steps	Identify the staff to participate Develop training for staff	Ask Megan and Sarah to participate	Identify staff to participate

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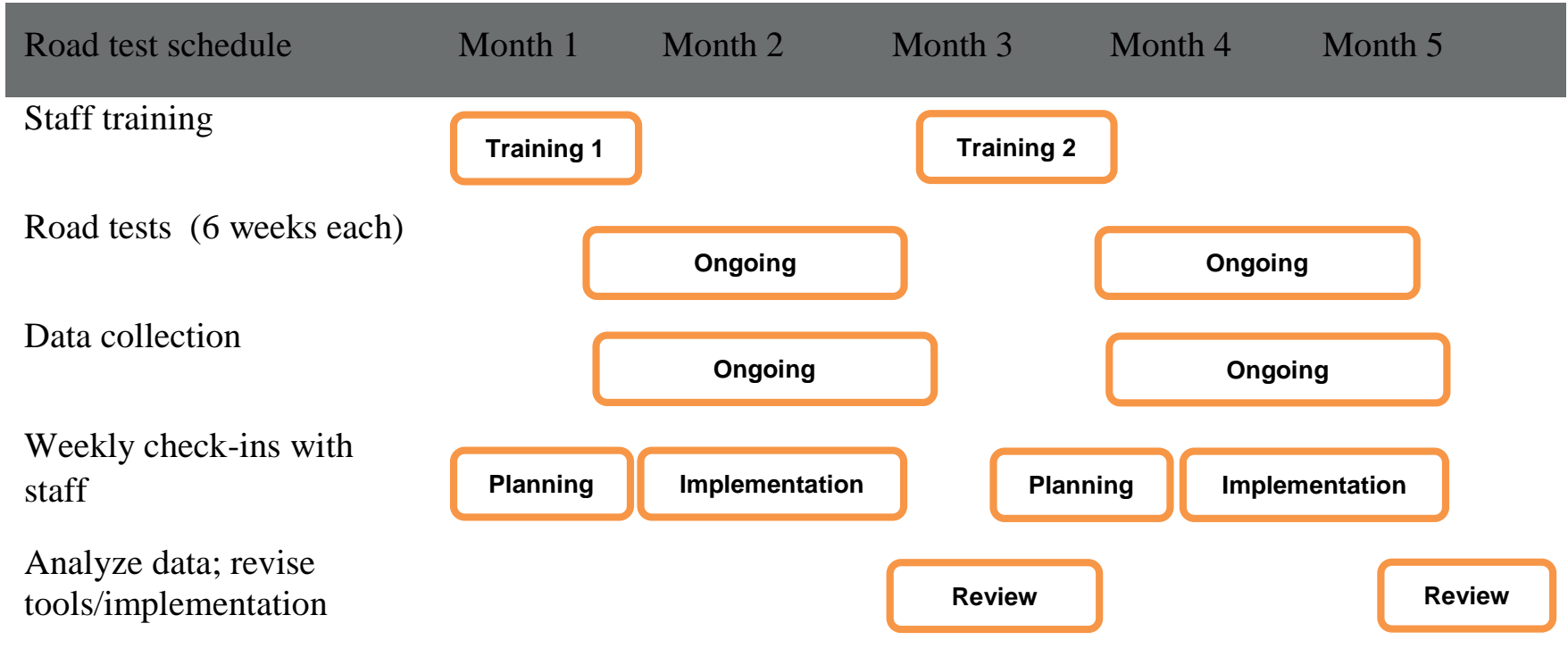
Draft learning questions

- **Learning questions: the questions you want to answer during the road test**

- **The questions help you prioritize 1 or 2 key tools/strategies**
  - **Usually can't test everything at once**

- **Inform data collection**

- **Remember:**
  - **Road tests can't collect causal information**
  - **Road tests focus on the quality of the implementation**

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Draft *your* learning questions

- **Examples:**
  - **How do customers respond to the CalMAP?**
  - **How much time does using the Goal-Plan-Do-Review add to meetings?**
  - **Do staff think the tools help them build stronger relationships with customers?**
  - **What does the worker need to do to fully integrate the tools into his or her work?**

- **Write down your ideas for learning questions in your work plan**
  - **Think about the <u>most important thing</u> you want to learn from the road test**

Develop a schedule

Road test schedule	Month 1	Month 2	Month 3	Month 4	Month 5
Staff training	Training 1		Training 2		
Road tests (6 weeks each)		Ongoing		Ongoing	
Data collection		Ongoing		Ongoing	
Weekly check-ins with staff	Planning	Implementation	Planning	Implementation	
Analyze data; revise tools/implementation			Review		Review

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Fresno's reflections

- **What worked well**
  - **Kickoff meeting**
  - **Office hours held weekly**

- **Challenges**
  - **Time constraints**
  - **Staffing changes**
  - **Length of time involved in working with clients**

- **What we wish we knew before starting**
  - **How much staff and resources would be devoted to the road tests**

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Fill in the schedule in your work plan

- **Think about your answers to these questions**
  - **How much time will you need to plan and prepare for the road test?**
  - **How much time do you need to train staff?**
  - **How much time do you need to test strategies or tools?**
  - **When do you want to start the road test?**
  - **What, if any, support activities will you offer during the road test?**
  - **How much time do you want between learning cycles? How much time do you need to analyze the data?**

2. Plan for data collection

Determine what kind of data you need

- **What do you need to know to answer your learning questions?**

	Quantitative data	Qualitative data
What is it?	Numbers, counts, percentages, scales	Quotes, comments, stories
Why use it?	Better for countable or categorical information	Better for exploratory purposes; "why" and "how" questions
Advantage	Easy to analyze	In-depth information
Disadvantage	Difficult to know the "why" behind the numbers	More staff time to collect Can be difficult to analyze

Determine who can answer your questions

- **Who can answer your learning questions?**
  - **Customers**
  - **Staff**
  - **Supervisors**
  - **Other stakeholders**

- **You might need to collect data from more than one type of person**

Determine the best way to collect the data

Method	Type of data collected	How to collect	Resources needed to prepare (level of effort)	Resources needed to collect (level of effort)	Resources needed to analyze data (level of effort)
Surveys	Quantitative (best) or qualitative (okay)	Electronic or paper form completed by staff and/or clients	Moderate	Electronic: low Paper: high	Quantitative: low Qualitative: high
Observation	Quantitative or qualitative	Electronic or paper form completed by staff about a co-worker	Moderate	Moderate	Quantitative: low Qualitative: high
Administrative data	Quantitative	Little additional effort	Low to moderate	Low to moderate	Low
Interview	Qualitative	Staff interview each other	Low	High	High
Focus group	Qualitative	Staff meet with other staff	Low	High	High

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Two ways to collect survey data

	Online	Paper
Advantage	Easy data collection and analysis using online tool	May be better for customer surveys or observations
Disadvantage	Takes more set-up How to get customers to fill out online form? Need to be careful about collecting sensitive data online!	Need to print out forms Resources needed for data entry

Create a data collection plan

Data collection method	When will data be collected?	How will the data be collected?	Who will collect the data from the respondent?	Who will store the data/how will it be stored?	Who will do the data entry?
Staff survey	After each interaction with customer	Electronic/online	Staff complete form themselves	Stored online	N/A
Customer survey	After each interaction with tools	Paper	Staff hands form to customer; customer returns form to front office	Administrative team	Administrative team
Focus group with customers	Once at the end of the road test	Electronic notes	Supervisors	Supervisors	Supervisors will take notes during the focus group

- **Tips: timing is everything; minimize burden**

Fresno's data collection

- **Surveyed both clients and staff**
  - **This was to obtain different perspectives from the user and administrator**
  - **Which was a valuable decision in hindsight as the responses varied**
  - **This gives us insight into how we can do a better job in marketing internally**

- **Conducted four surveys**
  - **3 online (job specialist, managers, supervisors)**
  - **1 paper (clients)**
    - Clients received a $5 gift card as incentive for completion (66 issued)
    - Paper survey results entered into online survey

- **Information collected was both qualitative and quantitative**

Fresno's data collection (cont.)

- **Road testers (job specialists) were expected to enter an activity line in our automated system to track clients with whom they used the tools**

- **Tracked client identification number (CIN) for each client who completed a paper survey**
  - **Protected client's anonymity**

- **Managers and supervisors worked together to develop surveys for all road testers**
  - **Used SurveyMonkey to create online surveys**
  - **Our Reports team assisted in analyzing all the data**

Fresno's data collection reflections

- ## What worked well
  - Pre-testing and reviewing surveys

- ## Challenges
  - Outcomes were difficult to determine (small sample size)

- ## What we wish we knew before starting
  - How to better identify our desired outcomes
  - Worker follow-up would be lower at second road test
  - Data set would be complicated/multiple variables. As the road test surveys responses were small in number, and surveys had multiple questions for each possible tool used, it caused the final analysis to be wide in scope with a relatively shallow data set.

Write down your ideas for data collection

- **Example below**

Data collection method	When will the data be collected?	How will the data be collected?	Who will collect the data from the respondent?	Who will store the data/how will it be stored?	Who will do the data entry?
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Create surveys, interviews, etc.

- **The manual includes example surveys and interview questions**

- **Two types of interview questions:**
  - **Closed questions**
  - **Open-ended questions**

Types/examples of closed questions

- **Multiple choice:**
  - **In what setting did you use the tool with the customer?**
    - Orientation
    - Initial individual meeting
    - Follow-up individual meeting
    - Workshop
    - Group meeting

- **Yes/No:**
  - **Did using the tool add time to your meeting with the customer?**
    - Yes
    - No

- **Scale (Agree/Disagree):**
  - **Indicate whether you agree or disagree with the following statement:** *The tools made it easier for me to communicate with the customer.*
    - Agree
    - Neutral or unsure
    - Disagree

- **Fill in the blank:**
  - **How long did the interaction with the tool last? (# of mins) _____**

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Examples of open-ended questions

- How are you using the tool with customers?

- What was the customer's reaction to the tools?

- How, if at all, have the tools changed your day-to-day work?

- What challenges have you faced using the tools?

3. Train and prepare staff

Train staff on tools and strategies

- **This is important in ensuring the road test is conducted as intended and provides useful results**

- **Beyond the scope of this presentation to go into more detail**

Train staff on data collection

- **Share key information about**
  - **The road test**
  - **Learning questions**
  - **Data collection plans**
    - Be sure staff understand their roles/responsibilities in the data collection

Example: Our road test

- **Start date: April 16**

- **End date: June 1**

- **Elena is coordinating; ask her any questions**

- **Weekly check-in meetings will be on Fridays at 3 p.m.**

Example: Our learning questions

- **How much time does using the CalMAP add to meetings?**

- **How can workers/customers effectively and efficiently use the tools?**

Example: Our data collection plan

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Example: Data collection methods

4. Conduct road test

4. Conduct road test

- **You are ready to begin using the tools or strategies**

- **Throughout the road test and especially in the beginning:**
  - **Offer supports to help staff**
  - **Check that staff are collecting data properly**

Next steps in road test

5. **Analyze data**

6. **Review data, revise strategies, and plan for the next road test**

We will cover these in an upcoming webinar:

- **Completing a Road Test: Analyzing data and reflecting on feedback**

- **Click [here](#) to register**

Next steps

- **Meet with other staff in your county to:**
  - **Discuss whether a road test is right for you**
  - **Share your thoughts on the work plan**
  - **Begin planning for your road test**

- **Review the road test manual**

- **Continue planning for implementation of CalWORKs 2.0 tools and strategies in your county**

- **Share your road test plans with county cohorts and implementation support lead**

CalWORKs 2.0 road test supports

- **Webinars**
  - **Using a Road Test to Improve Human Services Programs**
  - **This webinar!**
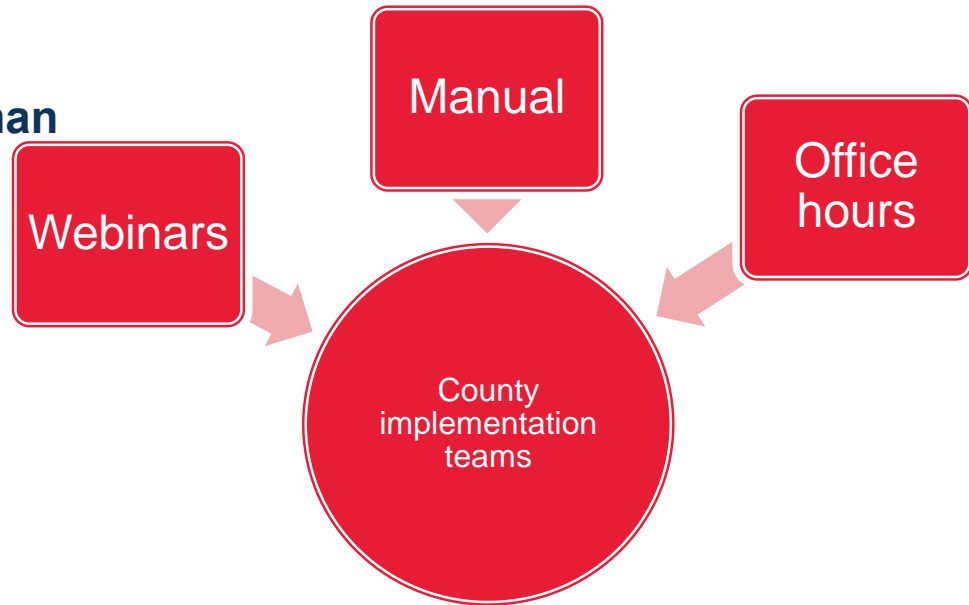 - **Completing a Road Test (April 25)**

- **Manual**
  - **In resource list**
  - **On Next Generation website**

- **Office hours**
  - **Starting March 1, every Thursday from 1 to 2 p.m. PT (ending in August)**
  - **Call (609) 945-6996, and then enter the access code 996 064 951**

- **How to get help**
  - **Email Lindsay (lcattell@mathematica-mpr.com), your cluster facilitator, or Calworks2.0@gmail.com**

What's in the manual?

Road test steps	Templates and examples
1. Plan for a road test	Work plan (the packet)
2. Plan for data collection	Work plan (the packet) Staff survey Customer survey Interview questions for staff
3. Train and prepare staff	
4. Conduct road test	
5. Analyze data	Example presentation
6. Review data, revise strategies, and plan for the next road test	Example presentation

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Questions?

Contact us with any questions

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