Work Plan 1

**Updated 6/12/17**

County Case Flow

This flow chart describes how clients move through County’s Welfare to Work program in metro and in rural areas.

Metro

Rural

Round 1 Road Test

| What | Who | How | When |
| --- | --- | --- | --- |
| Client-facing Tools | | | |
| Goal Setting with Clients:   * Goal-Plan-Do-Review * My Roadmap/ Potholes and Detours | Rural: 2 JS  Metro: 3 JS  Each staff works with 6-10 clients of their choice | During in-person contacts with clients | Each monthly contact (GPDR); after assessment plan (Roadmap/Potholes) |
| CalMAP | Rural: 2 JS  Metro: 3 JS  Each staff works with 6-10 clients of their choice | Use at time they receive OCAT results (whether or not that staff actually conducted the OCAT) | Initial interaction and follow-ups |
| Tools for County Staff | | | |
| Goal Setting with Workers:   1. Goal-Plan-Do-Review 2. My Roadmap/Potholes and Detours | 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 | Managers work with supervisors and supervisors work with staff | Monthly meetings between program managers and supervisors, and supervisors and staff |
| County Self-Assessment | Management/Supervisors | Use internally | Once; waiting on revised version from Kings |
| 24-month and 48-month counter | Trainers | Use internally | During training, particularly of new staff |
| Resource Map | J | Use internally | Populate once and then maintain; can be used as training tool or reference for staff |

Learning Questions:

* Does using goal-plan-do-review lead to **clients** …
  + Making progress toward their goals?
  + Better engagement with staff?
  + Increase their critical thinking?
* Does using the CalMAP lead to **clients**…
  + Identifying, visualizing and removing their barriers?
  + Better engagement with staff?
  + Increase their motivation?
* Does using goal-plan-do-review/CalMAP lead to **staff**…
  + Making progress towards their staff development goals?
  + Increase their critical thinking?

Timeline and Next Steps

Week of May 1st (complete):

* Mathematica to create and send work plan document (this document) to team
* Mathematica to set up phone call the week of May 8th
* team to decide on staff to participate in the road test

Week of May 8th (complete):

* Phone call to discuss this work plan and to begin planning for the road test
* Mathematica to revise based on 5/8 conversation
* team to work on finding a date for the training
  + One day for the training should be okay, pending further decisions about the road tests:
    - Roughly 8am-12pm: training for staff and supervisors who will use the client-facing tools in the morning
    - Roughly 1pm to 4pm: training for the staff who will conduct the road tests

Upcoming meetings and suggested staff to attend:

1. Big picture planning for road test (completed June 2)
   * Creating the Road map for change
   * High level thoughts on road test data collection
   * Suggested staff to attend:
     + Both deputy directors:
     + Five program managers:
     + One staff member from the operations and research team
2. Detailed planning for road test (completed June 9)
   * Deciding on what type of data we need
   * Deciding on how we want to collect and analyze the data
   * Plan for creating the instruments
   * In attendance:
     + 1-2 leadership representatives
     + 1-2 Job Specialists
     + One staff member from the operations and research team

Weeks of June 12 and 19

* County to draft data collection instruments
* County to think through logistics of feedback collection (e.g., where clients will deposit paper feedback forms)
* Mathematica to provide support and input as needed

Week of June 26th

* Mathematica will conduct training on the tools with staff, supervisors, and managers participating in the road test
* Mathematica and/or County staff will discuss the feedback tools that are part of the road test during the training and demonstrate how staff and clients should complete them
* Mathematica and the County data collection team will have a working meeting to go over all aspects of the data collection and finalize instruments

Road test start date soon after June 26th:

* Week 1-7: Training and round 1 road test
* Week 8-9: Analyze data and plan for round 2 road test
* Week 10-15: Round 2 road test
* Week 16-17: Analyze data and make final modifications

Data Collection Plan

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Method** | **When will it be collected?** | **How will the data be collected?** | **Who will collect the data from the respondent?** | **How/who will store the data?** | **Who will do the data entry?** |
| **Client-facing tools** | | | | | |
| Staff-client interaction feedback form (staff version) | After every staff-client interaction | Electronic/ Online | Frontline worker completes form | Stored online | N/A |
| Staff-client interaction feedback form (client version) | After every staff-client interaction | Paper | Client completes form and deposits… | ? | ? |
| Focus group with customers | ? | ? | ? | ? | ? |
| Focus group with direct service workers | ? | ? | ? | ? | ? |
| Administrative data on clients | ? | N/A: Already exists | N/A: Already exists | Stored in existing database | N/A |
| **Tools for county staff** | | | | | |
| Management-staff interaction feedback form (manager/supervisor version) | After every monthly meeting | Electronic/ Online | Program manager/ supervisor completes form | Electronic/ Online | N/A |
| Management-staff interaction feedback form (staff version) | After every monthly meeting | Electronic/ Online | Supervisor/ staff completes form | Electronic/ Online | N/A |