road test Work Plan 3

County Case Flow

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

County has an efficient intake process during which integrated case workers (ICW) complete eligibility, orientation and administrative portions of the OCAT at time off application completion. Customers are then randomly assigned (based on availability) to an Employment and training worker (ETW) who completes life-area specifics of OCAT, develops plan and manages case. ETWs manage all status updates, supportive service fund distribution special initiative funding (FSP) a activity access through regular case management.

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.

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| --- | --- | --- | --- | --- |
|  | QOL -Index | CalMAP | Goal Setting Tools | County Level Tools |
| What | One page quality of life measure | Client- Empty  Worker- With words | My Goal plan (Goal/Plan/Do/Review-Revise)  My Roadmap  Potholes and Detours | County Self-assessment tool  Resource Map |
| When | • At appraisal  • Coming off exemption;  Sanction; good cause  • Signing cure plan  • Transitions  • Early stage job  placement | • Introduction – intake  (not filled out)  • After completion of  goal to demonstrate  success  • Periodically with offer  to update goals  • Beginning of appraisal  • Substitute for OCAT  action plan | • At intake  • All follow-up opportunities  Future considerations:  • Goal-setting workshop  • Include EW’s in use of tool  • Adapt to phone check-ins  • Long term goal identified  • Goal with multiple steps  Identified  • During assessment  interpretation (if warranted) | During 6 week road test first cycle |
| Who-  Staff and Clients | ETW’s and VC’s  Clients staff encounter at the intervals described in “when” (noted above) | ICW’s/ ETW’s / VC’s  All customers may be eligible, consider road test and “when” status (noted above) | ICW’s / ETW’s / VC’s  All road test customers  ETW’s / VC’s  All road test customers (see notes in “when”)  ICW =  ETWs =  VCs = | Key management staff with input from workers |
| How | * ICW selects 10 new applicants, of course. * ETWs choose clients at the above designated intervals and respond to Mathematica. Clarification will be requested to determine if contact with Mathematica is required after each time a tool is used or only after the tool is introduced for the first time with each client. * VCs will receive communication from ETWs regarding clients referred who have been administered the new tool. The Road Testers should assess half way through the six weeks to determine if any VCs have received a referral for a Road Test client. Consider opening use of tools to WtW clients referred for job search with no previous exposure to the new tools, though, there may be no follow up when returning to WtW. may decide to continue use of tools with clients in round 2 of the road test, and also add new participants. This decision can be made at the close of road test 1. | | | |

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 5+ staff working with about 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 have worked with to identify the best methods for collecting road test feedback. Feedback will include online worker surveys, paper client surveys, interviews with staff, and potentially a customer focus group. The draft schedule below reflects the process for County.

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| --- | --- | --- | --- | --- | --- |
| Process/Activities | July 2017 | August 2017 | September 2017 | October 2017 | November 2017 |
| Technical assistance from strategic initiative team |  |  | **Ongoing** | **Ongoing**  **Ongoing** |  |
| Staff training | **In person** |  | **Webinar** | **Frontline, Supervisors, and Management** |  |
| CalWORKs 2.0 tool implementation |  | **Ongoing** |  | **Ongoing** |  |
| Feedback: Interviews or focus groups with staff |  |  |  |  |  |
| Feedback: Worker survey (each client meeting), Participant survey at 1st exposure |  | **Implement**  **Plan** | **Plan** | **Implement** |  |
| Check-in teleconference with county |  |  |  |  |  |
| Review data and revise tools/implementation |  |  |  |  |  |

Learning objectives

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| --- | --- | --- |
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| Strategies:  What we will do? | **Targets:**  What we will change?  (attitudes, behaviors, skills) | **What success will look like:** |
| Infuse and reiterate goal setting regularly as part of one-on-one and group check-ins; emails with GPDR templates | 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. | Less noncompliance, more engagement, convey that workers are really here to help and are motivated by client success. Create buy-in. |
| Provide some guidelines and resources (such as a script) for staff to make a shift in the conversational structure to enter more meaningful dialogue with customers | Ask different types of questions during engagements and be more “genuinely interested” in clients to build rapport outside of rules and regulations. Build up the clients. | Meaningful engagement – quality not quantity. |
| Takes the broad goal of self-sufficiency and makes it more meaningful for each customer | Pinpoint the range of possible successes – have staff see this range and have more flexibility/ideas about where they should direct clients. Culture shift around possible outcomes. | Progress within unique caseloads. |
| Integrate CalMAP into assessment and re-appraisal process, and make client directed process | 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. | Less people requesting exemptions because they are more engaged. Visualize progress – for clients, workers and management. Provide quantification of progress/success. |
| Reframing all client interactions around goal-achievement | Decrease emphasis on requirements/regulation (which does not motivate the customer) and increase client investment. | Increased staff engagement and motivation to connect with clients. |

Feedback structure and schedule

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| --- | --- | --- | --- |
|  | **Staff Feedback Survey (online)** | **Customer Feedback Form (paper)** | **Staff Interview** |
| Week 1  Aug 21 | Every interaction with customer (in road test pool) | First time they use a new tool |  |
| Week 2  Aug 28 | Every interaction with customer (in road test pool) | First time they use a new tool |  |
| Week 3  Sept 4 | Every interaction with customer (in road test pool) | First time they use a new tool | 1 30 minute conversation with frontline staff (individually) |
| Week 4 Sept 11 | Every interaction with customer (in road test pool) | First time they use a new tool |  |
| Week 5  Sept 18 | Every interaction with customer (in road test pool) | First time they use a new tool | 1 45 minute conversation with supervisors and management (group) |
| Week 6  Sept 25 | Every interaction with customer (in road test pool) | First time they use a new tool | 1 30 minute conversation with front staff (individually) |