



# CalWORKs 2.0 | Next Generation

## **Completing a Road Test**

Webinar #9

**April 25, 2018 @ 2:00–3:00 p.m.**

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Facilitated by:

Lindsay Cattell, Mathematica Policy Research

Veronica Rodriguez, County of Fresno Department of Social Services

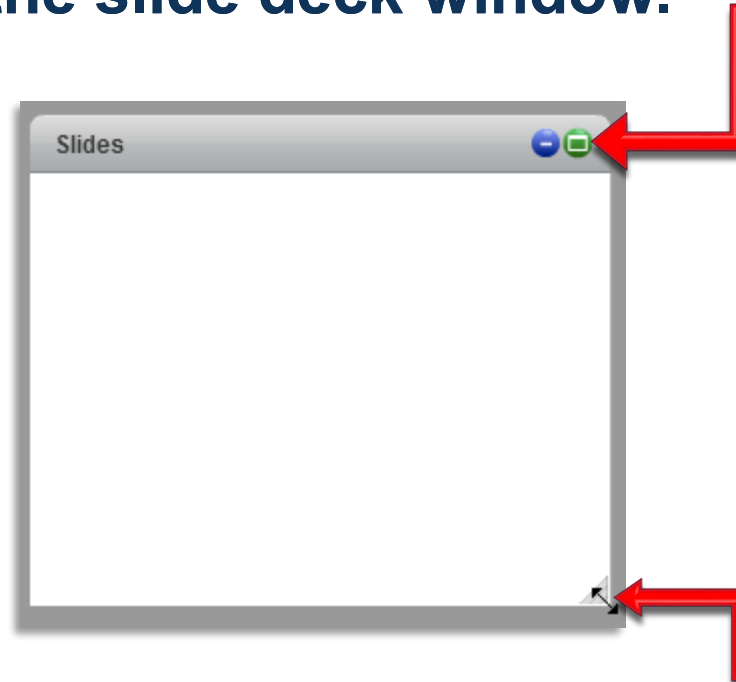
Dean Brawley, County of Fresno Department of Social Services

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# Expand Event Windows

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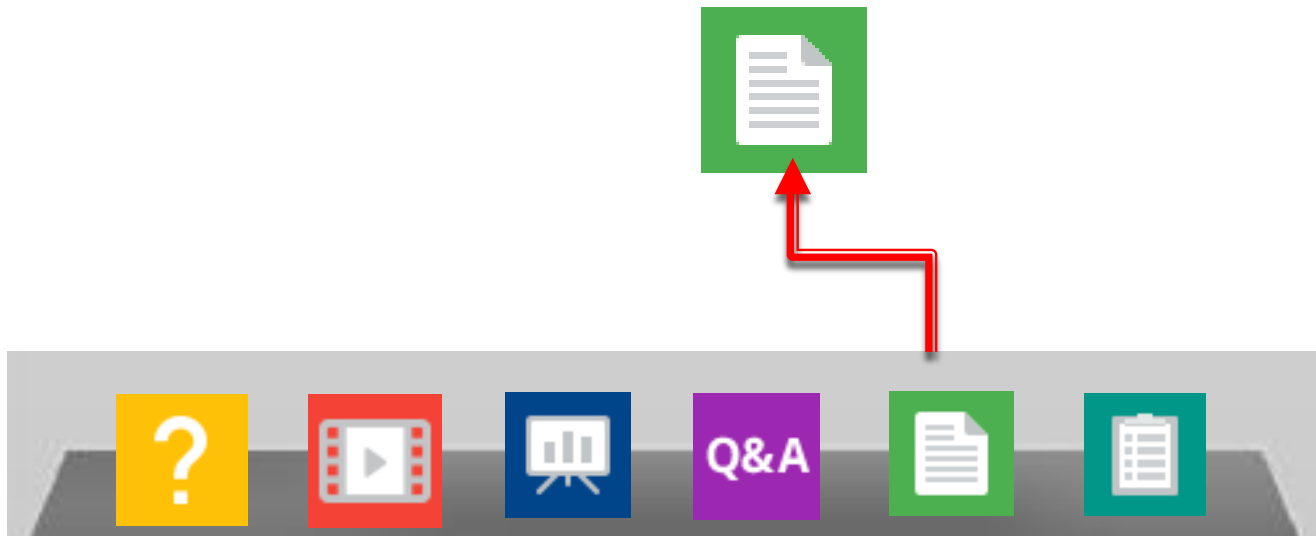


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# Event Materials and Recording

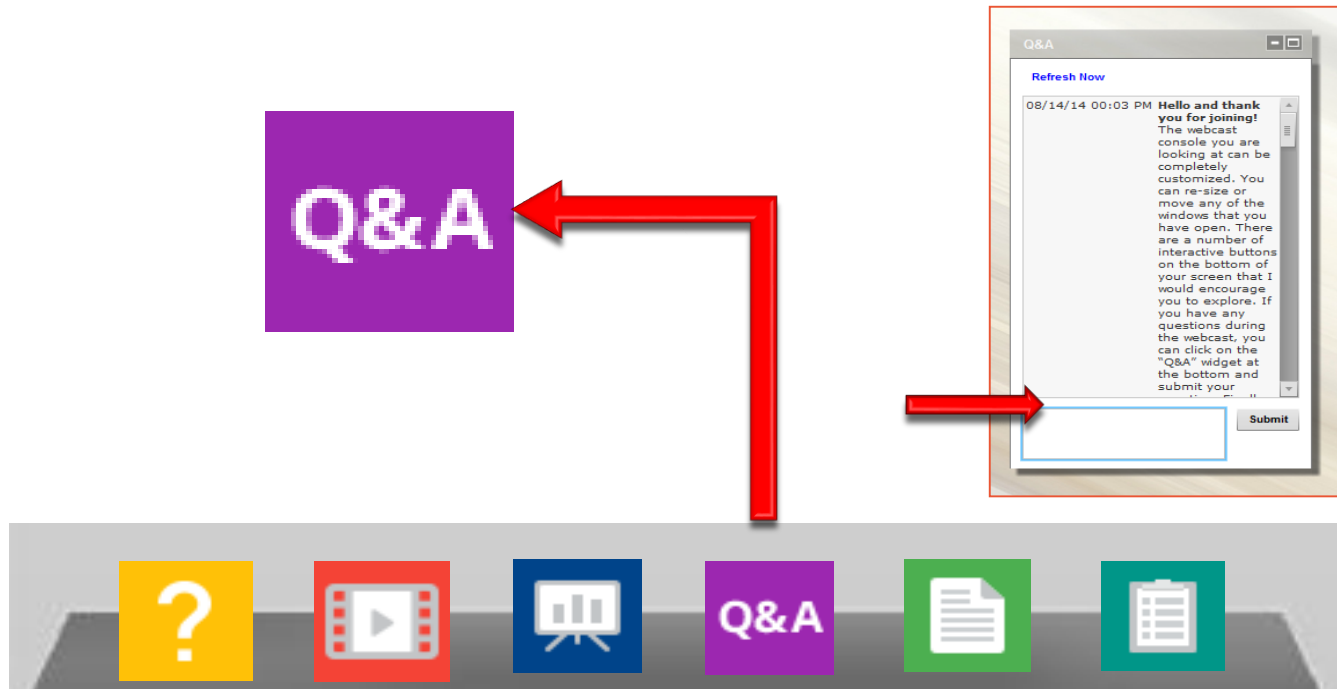
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- The event recording will be available approximately 1 day after the webcast and can be accessed using the same audience link used for the live webcast.
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# Q&A

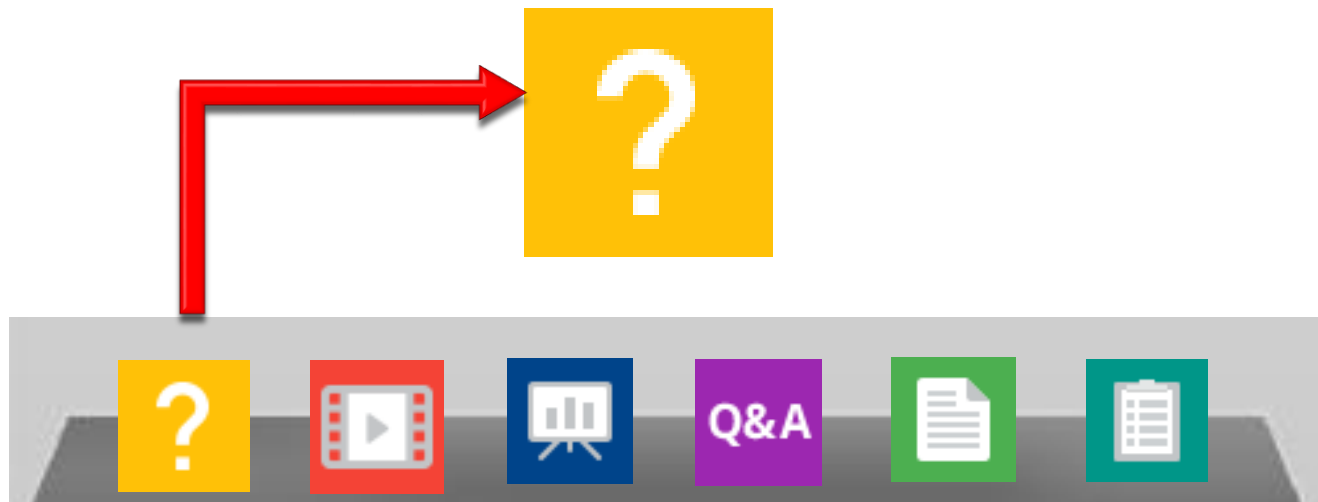
- To pose a question to the presenters or to the group at any time, click on the Q&A widget at the bottom and submit your question.
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# Welcome!

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**Lindsay Cattell**

Mathematica Policy Research



# Facilitators: Fresno County

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Veronica Rodriguez



Dean Brawley



# Goals For This Webinar

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- Explore the last two steps of the road test process
- Hear from Fresno County staff on their experiences with data collection and analysis
- Review supports available to counties that are conducting road tests



# Poll Question

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- **Where are you in the road test process?**
  - Not planning but interested
  - Planning for road test
  - Conducting a road test
  - Starting to analyze data
  - Other

# The Road Test

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**A subset of frontline staff (5 – 10)**

*working with*



**A few customers per staff (5 – 10)**

*trying out*



**Select CalWORKs 2.0 strategies and tools**

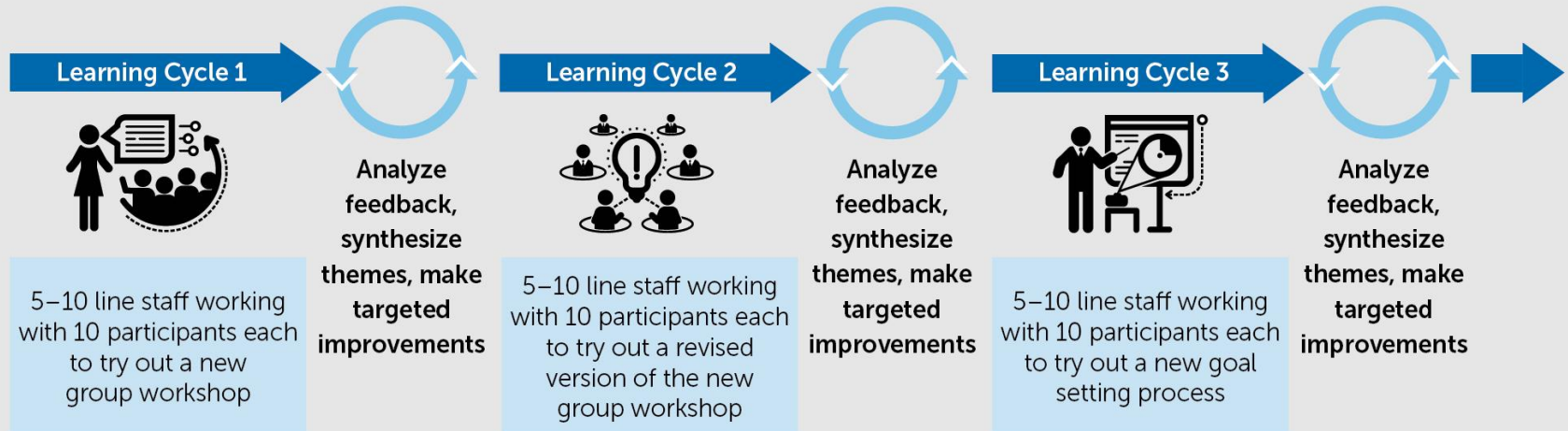
*providing*



**Targeted feedback about implementation**

# An Example of the Road Test Process

## An example of the road test process



# Road Test Steps

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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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# Poll Question

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- What is a challenge you anticipate as your county plans for and implements a road test?
  
- Write your answer in the Q&A box.

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## 5. Analyze Data

# Analyze Data

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- Time to summarize the data you collected!
- A subset of the entire team often analyzes the data
- Be sure to share results with entire road test team
- Focus on:
  - Answering your learning questions
  - Identifying strengths and challenges related to implementation



# Example: Data Collection Plan

Data collection 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?
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

# Description vs. Correlation vs. Causation

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- **Description**
  - Summarizes all the answers collected
  - Example: 87% of people like cake
- **Correlation**
  - A and B are related, but A does not necessarily cause B
  - Examples:
    - As ice cream sales increase, the rate of drowning deaths increases
    - However, consuming ice cream does NOT cause drowning deaths
- **Causation**
  - A causes B
  - Example: Smoking causes lung cancer
- Road tests produce **descriptive** evidence, not causal (sometimes correlational)

# Quantitative Data Analysis and Reporting

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- **Frequencies**

- Use for multiple choice, yes/no, and scale responses
- Can be presented as:
  - Percentages: 50% of staff
  - Counts: 5 staff
- **Example:**
  - 73% of staff agreed that using the tool made it easier for them to communicate with the customer

- **Averages**

- Use for numbers only
- **Example:**
  - Average age of customer: 24
- **May also be useful to present a range alongside any average**
  - Customer ages ranged from 19 to 32

# Quantitative Data Analysis and Reporting

- Goal: summarize data across many people
- How:
  - Export data to Excel
  - Analyze using:
    - Commands: average, max, min, sum
    - Charts: frequencies

	A	B	C
1		Age	
2	Customer 1	19	
3	Customer 2	18	
4	Customer 3	22	
5	Customer 4	20	
6	Customer 5	27	
7		=AVERAGE(B2:B6)	
8			

# Reporting Example: Demographic Data

Participant Characteristics (n=38)	
<i>Characteristic</i>	<i>Average or Percentage</i>
Age	31 years
# of Children	1.7
Female	89%
Male	11%
White	68%
Hispanic	13%
Black	5%
Native American	5%
Length of time with coach	5.4 months
Length of time on TANF	15.4 months

# Reporting Example: Categorical Data

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- **Question from survey:**

- **For the following statements, please indicate the extent to which you agree or disagree with each:**

- It was easy to use the tools.
- I liked using the tools.
- The tools made it easier for me to communicate with the case manager.
- I don't want to use the tools.
- I trust the case manager and feel like I could be honest with her/him.

# Reporting Example: Categorical Data

Rate your agreement with the following statements:



# Qualitative Data Analysis and Reporting

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- **Goal: pull out the themes (common ideas) across the responses**
- **How:**
  - **Put all the responses in one place (Excel might be helpful)**
  - **Within each question:**
    - Read all the responses
    - Notice any themes (common ideas) across the responses
    - Go back and categorize the different responses into the themes you've identified
    - As needed, identify additional themes and categorize responses
  - **Repeat this process for each qualitative question**



# Qualitative Data Example

	Question 1: What challenges have you faced using the tools	Question 1 Analysis
Staff 1	I had one customer that didn't really understand the tool at first, so I had to describe how and why to use the tool multiple times.	Introducing the tools
Staff 2	I haven't really had any challenges.	None
Staff 3	It seems to be going well. I can't think of anything.	None
Staff 4	When I was first talking with the client, it took me a while to introduce the tool. I didn't feel like I had the right words to describe the tool.	Introducing the tools
Overall		Some staff face challenges introducing the tools to customers.

# Reporting Example: Qualitative Data

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- **Group sessions worked well and had nice flow**
- **The program tools are fluid and staff found it easy to set up profiles**
- **Participants seem excited about using the system**
  - **7 participants explicitly stated that they liked the system**
  - **3 participants stated that the system has potential once glitches have been resolved**

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# Fresno's Experiences

# Data Collection

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- Both qualitative and quantitative data
- Data collected through online survey tools and paper surveys (total of four surveys)
- Online surveys were deployed for the worker, staff, and management surveys
- Customer surveys collected via paper forms, which staff then transcribed into an online survey tool
- Frontline staff assistance/responsibility:
  - Distribute customer survey
  - Complete worker survey based on their use of tool:
    1. With the customer
    2. AND with their supervisor

# Data Collection (cont'd)

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- **Survey types, collected after using one or more tools:**
  - *Customer Feedback Survey:* collected information from customers
  - *Worker Feedback Survey:* collected information from staff after meeting with customers
  - *Staff Feedback Survey:* collected information from staff after their conferences with supervisors
  - *Management Feedback Survey:* collected information from supervisors after administering survey during conference

# Data Analysis

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- **Completed by our Operations Research and Reporting Division**
  - Took about 7 to 8 hours
  - Included cleaning raw data, extracting findings, and validating data
- **Lessons learned:**
  - *Small sample size:* Due to the small sample size, we struggled to pull out meaningful comparisons/observations from the data.
  - *Short study period:* Two collection times spaced a week apart did not provide enough time to show significant difference in outcomes.
  - *Inadequate follow-up responses:* A contributing challenge caused by small sample size. Follow-up responses to the second road test were hard to analyze due to loss of staff/customers for follow-up surveys caused by staff changes.

# Fresno Data Analysis Slide

SURVEY ITEM	OPTIONS	INITIAL		FINAL		
		Ct	%	Ct	%	
What was the client's engagement with the WTW program PRIOR TO THIS APPOINTMENT?	Fully engaged (Meeting required hours)	7	35%	10	50%	↑ +3 +15%
	Partially engaged (In activity; not meeting hours)	3	15%	8	40%	↑ +5 +25%
	Not engaged	6	30%	2	10%	↓ -4 -20%
	Currently in Noncompliance/Sanctioned	4	20%	-	0%	↓ -4 -20%
	Grand Total	20	100%	20	100%	
What was the client's engagement with the WTW program AT THE END OF THIS APPOINTMENT?	Fully engaged (Scheduled to meet required hours)	11	55%	10	50%	-1 -5%
	Partially engaged (In an activity but will not meet	8	40%	8	40%	0 0%
	Not engaged	-	0%	2	10%	↑ +2 +10%
	Other	1	5%	-	0%	-1 -5%
	Grand Total	20	100%	20	100%	
What best describes the client's current status or situation?	Work ready	6	30%	7	35%	+1 +5%
	Stable but not work ready	11	55%	10	50%	-1 -5%
	Currently in Noncompliance or Sanctioned status	-	0%	-	0%	0 0%
	New client	2	10%	1	5%	-1 -5%
	Other	1	5%	2	10%	+1 +5%
	Grand Total	20	100%	20	100%	

SURVEY ITEM	OPTIONS	INITIAL		FINAL		
		Ct	%	Ct	%	
Goal-Plan-Do-Review OUTCOMES: Was the goal met?	All of the goal was met	-	0%	6	55%	↑ +6 +55%
	Most of the goal was met	-	0%	1	9%	+1 +9%
	Some of the goal was met	-	0%	2	18%	↑ +2 +18%
	No, the goal was not met	-	0%	1	9%	+1 +9%
	First time tool was used	11	100%	1	9%	↓ -10 -91%
	No response	-	0%	-	0%	0 0%
	Grand Total	11	100%	11	100%	

# Data Analysis (cont'd)

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- **What we wish we would have known at the beginning:**
  - Worker follow-up would be lower at second road test
  - Data set would be complicated, with multiple variables
    - Few responses to the road test surveys + surveys having multiple questions for each possible tool used = final analysis was wide in scope with a relatively shallow data set
- **What we would suggest for other counties thinking about a road test:**
  - Keep pilot staff engaged to ensure continued use of tools
  - Reminders to take surveys for both staff and clients
  - Set a target for number of surveys or data you would like collected, monitor target



# Question

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- **What is one thing you are hoping to learn from the data in your road test?**
  
- **Write your answer in the Q&A box.**
  - **Look at your survey again to make sure it is collecting the information you need.**

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## 6. Review Data, Revise Strategies, and Plan for the Next Road Test

# Reviewing and Revising

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- **Review and reflect on the data**
  - What worked well?
  - What were some challenges?
- **Revise strategies as needed**
  - How might we build on and use our strengths (aspects that have worked well)?
  - How might we address or resolve the challenges that arose (aspects that have not worked well)?
- **Plan for the next road test**

# Example: Reflections

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- How might we build on and use our strengths (aspects that have worked well)?
- How might we address or resolve the challenges that arose (aspects that have not worked well)?

# Example: Revisiting the Strategies

## • What specifically needs to change?

	Goal-Plan-Do-Review (tool)	CaIMAP (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 customers	5 staff members in each office  Each staff member works with 3 to 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 to 5 customers of his or her choice
How	Staff member will approach customer with tool; customer can refuse to participate	Introduce and give CaIMAP to customer before OCAT, conduct OCAT, ask the customer to fill in the CaIMAP, 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

# Example: Revisiting the Learning Questions

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- What are our learning questions for the next road test?

# Example: Revisiting Our Data Collection Plan

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# Example: Next Steps

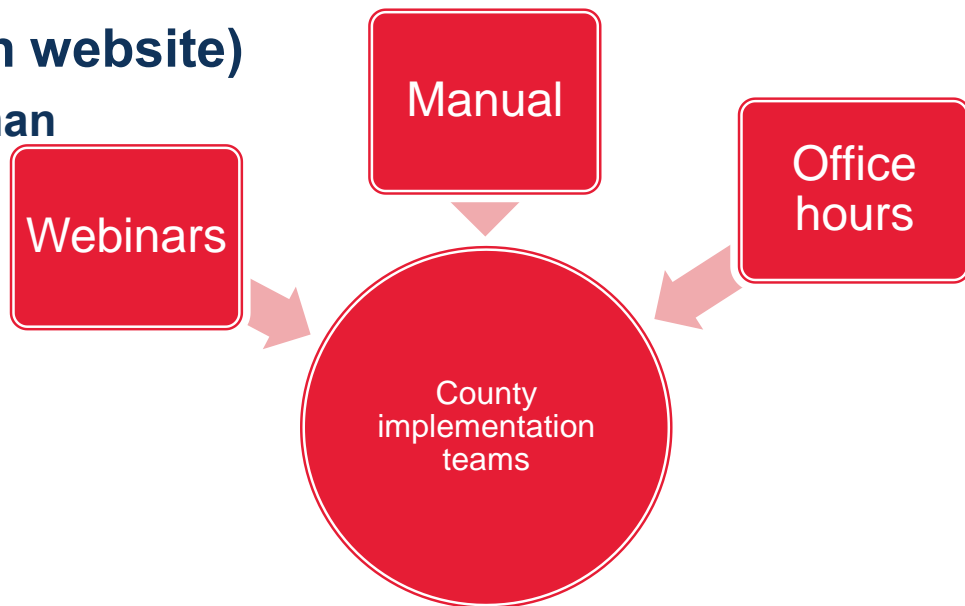
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- Plan for next road test



# CalWORKs 2.0 Road Test Supports

- **Webinars (available on NextGen website)**
  - Using a Road Test to Improve Human Services Programs
  - Planning for a Road Test
  - This webinar!
- **Manual**
  - In resource list
  - On NexGen website
- **Office hours**
  - 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](mailto:lcattell@mathematica-mpr.com)), your cluster facilitator, or [Calworks2.0@gmail.com](mailto:Calworks2.0@gmail.com)



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# Questions?

# Contact Us with Any Questions

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- **Lindsay Cattell, Mathematica Policy Research**

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