CALWORKS 2.0

The CalWORKs program has made significant changes over the past 25 years in response to economic, budgetary, and political forces. Some of these changes have expanded the options available for helping customers and even resulted in customer success. However, there is **room for additional improvement.** The current compliance-oriented, directive case management approach has had limited success. Recognizing this, the County Welfare Directors Association of California launched an initiative to incorporate emerging research evidence on brain science, behavioral science, and best practices on how adults learn and build critical skills.

> **CalWORKs 2.0, a new framework for delivering CalWORKs services, emphasizes goal achievement and intentional service selection, and considers the circumstances and needs of the entire family.**

Known as CalWORKs 2.0, this new approach focuses on helping people **set and achieve their goals,** which requires an environment with flexibility and a shift from directive case management to customer-led case management focused on goals. The redesigned approach will help families set goals that are aligned with program aims while taking into account families' strengths and the obstacles they face. With CalWORKs supports and services, some customers are able to begin immediately, but others need time to resolve crises and address significant challenges before they can progress. CalWORKs 2.0 emphasizes the importance of engaging in activities on the way to full employment. While this is a fundamental shift for some counties, other counties may already be implementing some of these concepts into their current work.

The design of CalWORKs 2.0 draws from emerging research in several complementary fields:

- **Adult capabilities:** Long-term exposure to the stresses of poverty affects adults' core capabilities (such as organizing, planning, self-control, and monitoring). Core adult capabilities are best improved through supportive relationships that empower people to make choices that are meaningful to them.

- **Goal achievement:** Working on goal achievement can ultimately have a positive effect on self-sufficiency. Adults are more likely to achieve goals when (1) they set goals that are meaningful to themselves; (2) the goals are specific, short-term, and within their reach; and (3) plans are in place to address roadblocks before they occur.

- **Behavioral science:** Living in poverty imposes a "bandwidth tax" that limits people's ability to see and plan for the future. Programs can increase success by streamlining requirements, removing unnecessary hassles, and ensuring that communications focus only on the most important information.

- **How adults learn:** Adults need to do something with new information in order to learn. Learning happens when people focus on what is most relevant to their life now. Adults are more likely to make changes in their life when staff engage in supportive (rather than directive) relationships.

Goal-achievement framework

In a goal-achievement framework, families set **individual goals** that are **meaningful to them** and aligned with program aims, but are realistic given their strengths and challenges. When customers are working on goals that are meaningful to them and within their reach, customers may be more likely to participate and stay engaged long enough to progress. In contrast, when customers are required to participate in activities that do not directly address their current circumstances, they are unlikely to follow through. The clear messaging of each interaction should be: "CalWORKs is here to help you set and achieve your goals."

The message for customers is:

"CalWORKs is here to help you set and achieve your goals."

The CalWORKs 2.0 goal-achievement framework is built on a **four-step process** that, if practiced regularly and with fidelity, will build skills and make setting and achieving goals easier and more effective. Any meeting with a customer can cover one or more steps. The four steps are always in the same order:

1. **Goal:** Set a goal—something that the customer wants to accomplish and is within their reach.
2. **Plan:** Create a road map for how to achieve the goal and identify obstacles and solutions.
3. **Do:** Put the plan into action.
4. **Review/Revise:** Assess what was achieved and what wasn't; make a new plan, modify an existing goal, or set a new one.

The framework relies on the idea that **successful small steps** will lead to better long-term outcomes. Using the CalWORKs 2.0 tools, customers can set and achieve goals and benchmarks (such as showing up for appointments, calling and connecting to service referrals, completing job readiness training, attending job fairs, attending mental health counseling) on the way to meeting longer-term goals like full-time employment. Applying a customer-driven goal-achievement approach is more motivating for customers than a compliance-driven approach and will help customers stick with their planned activities.

While working with customers, there are many ways to do **your work through a goal-achievement lens:**

•   During an intitial meeting, customers can reflect on their strengths and challenges, set goals, and make plans to achieve their goals.

•   Workers and customers can check in about the goal progress and review or revise the goal.

•   All interactions with customers and all work-related activities are suitable for the goal-achievement process.

Why this approach to goal achievement is different

Most human service programs touch on goal-setting and planning with customers along with activities like removing barriers (e.g. childcare referral), job search, and training referrals. Research suggests that a focus on these common activities is likely not enough to accomplish real change. Instead of requiring every customer to do the same activities at the same pace, the GPDR framework focuses on empowering customers to set and achieve their own goals. With use, interactions between staff and customers can become more relational and less transactional. Here are highlights of how each stage of the GPDR process differs from current practice.

Goal	- Customers set goals, not the program or staff - Staff act as facilitators, not fixers - Staff guide clients beyond generic goals to personally meaningful goals within the client's control - Staff help clients build confidence with success in achieving feasible short-term goals - Staff suggest ways clients can use program activities and services to help achieve their goals
Plan	- Staff guide clients to develop specific, yet simple plans (including what, when where and how) - Staff help clients identify strategies to overcome potential obstacles *before they happen.* - Staff work with clients to write their plans down and rehearse them
Do	- Staff provide support and encouragement when clients are doing their plans - Staff design opportunities for clients to support and encourage each other - Staff offer opportunities for clients to build and practice skills they need to remain focused on goals and do their plans - Program components with frequent contact (job search, work experience or subsidized employment) offer skill building opportunities related to goal achievement
Review/Revise	- Staff focus client check-ins on assessing how things went and how it relates to moving forward - Plans are viewed as living documents that change as clients learn more about their strengths and become clearer about what matters most to them