



Hallmarks of CalWORKs 2.0

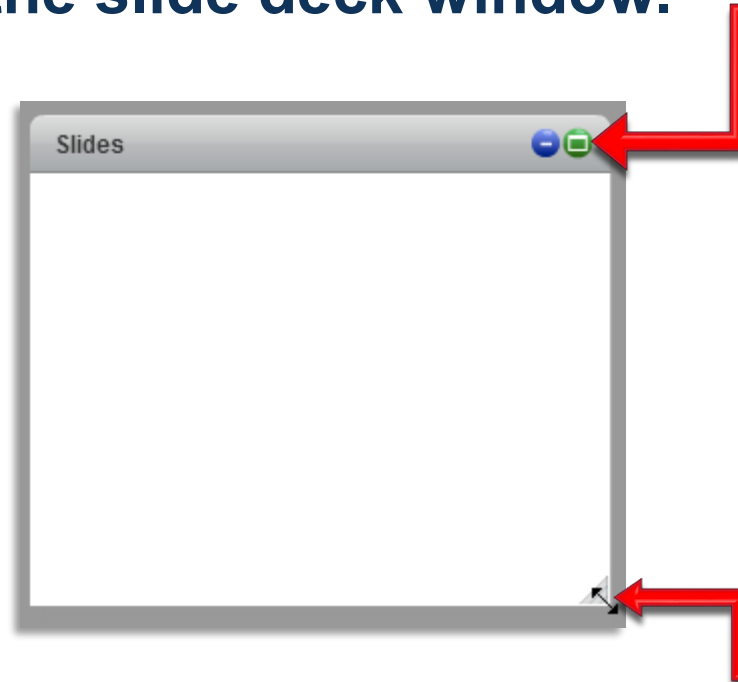
Facilitated by:

Natasha Nicolai, Mathematica Policy Research

May 2, 2018 2:00 – 3:00 p.m., PT

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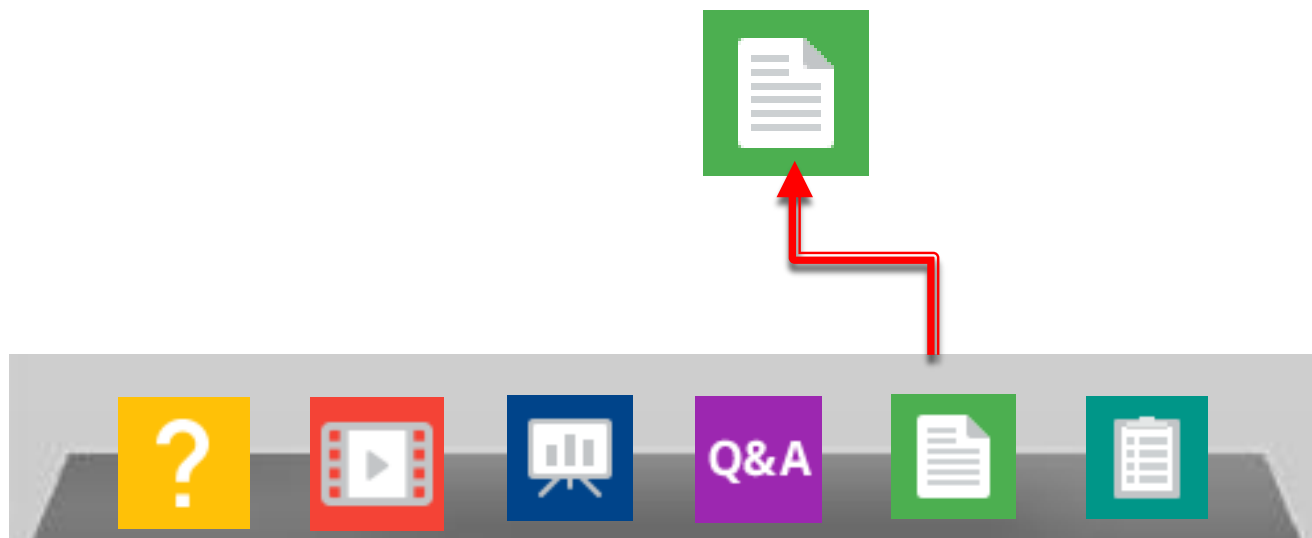
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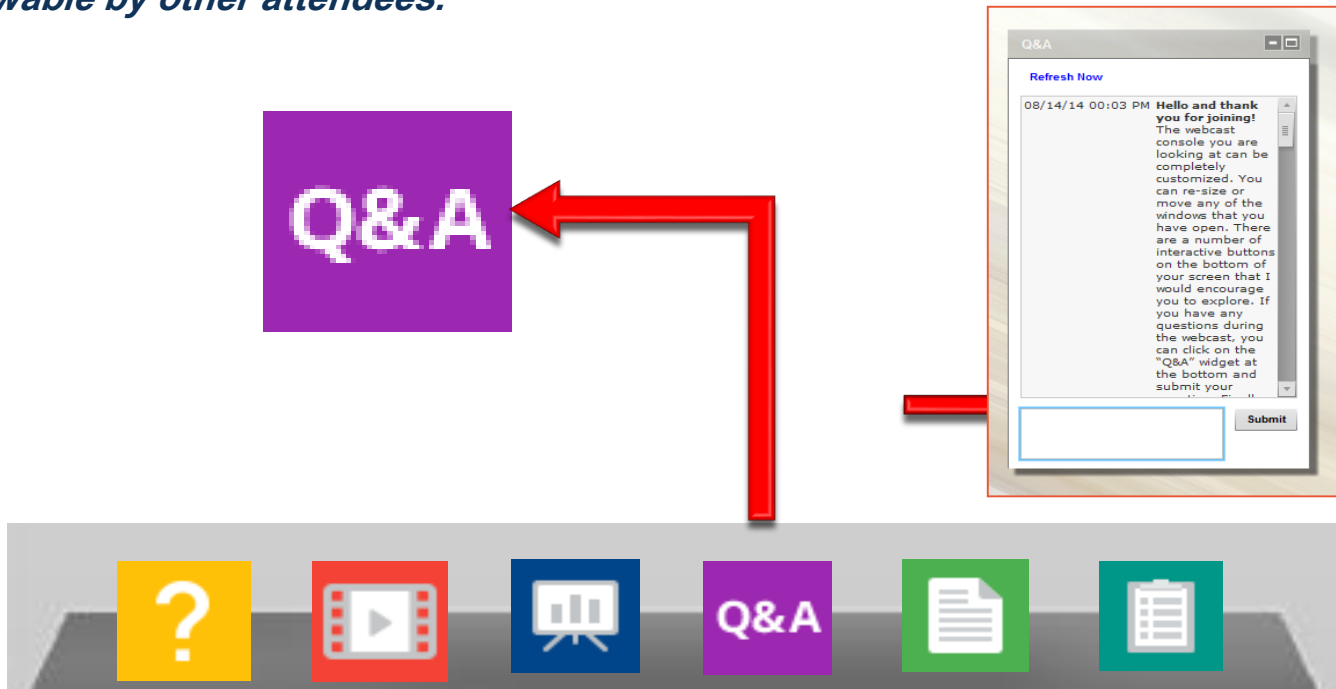
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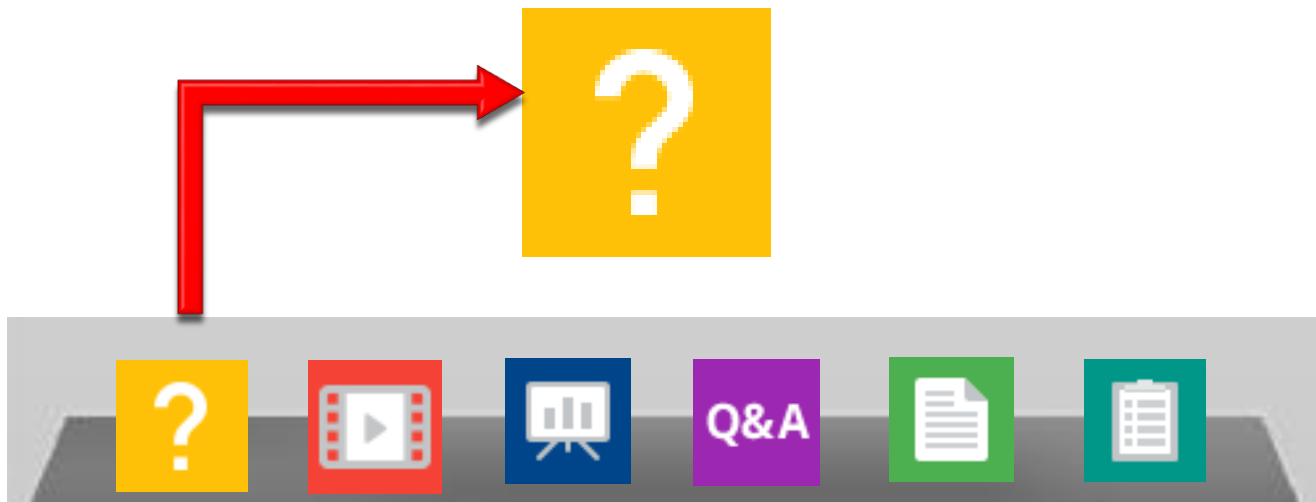
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Facilitators

Natasha Nicolai
Mathematica Policy Research



Poll Question:

- **How are you connected to CalWORKs?**
 - I am an advocate for participants/parents/families
 - I work in a partner organization
 - I work for the state
 - Other

Goals for this Webinar

During this webinar, we will:

- **Set the context for CalWORKs 2.0**
- **Provide a snapshot of CalWORKs 2.0**
- **Examine national insights and findings from the CalWORKs 2.0 needs assessment**
- **Examine what is different about CalWORKs 2.0 in messaging and tools**
- **Identify what the implications are for counties**
- **Describe how CalWORKs 2.0 might support counties' innovative work**
- **Explore how this approach connects with other state work and your interests – share ideas**

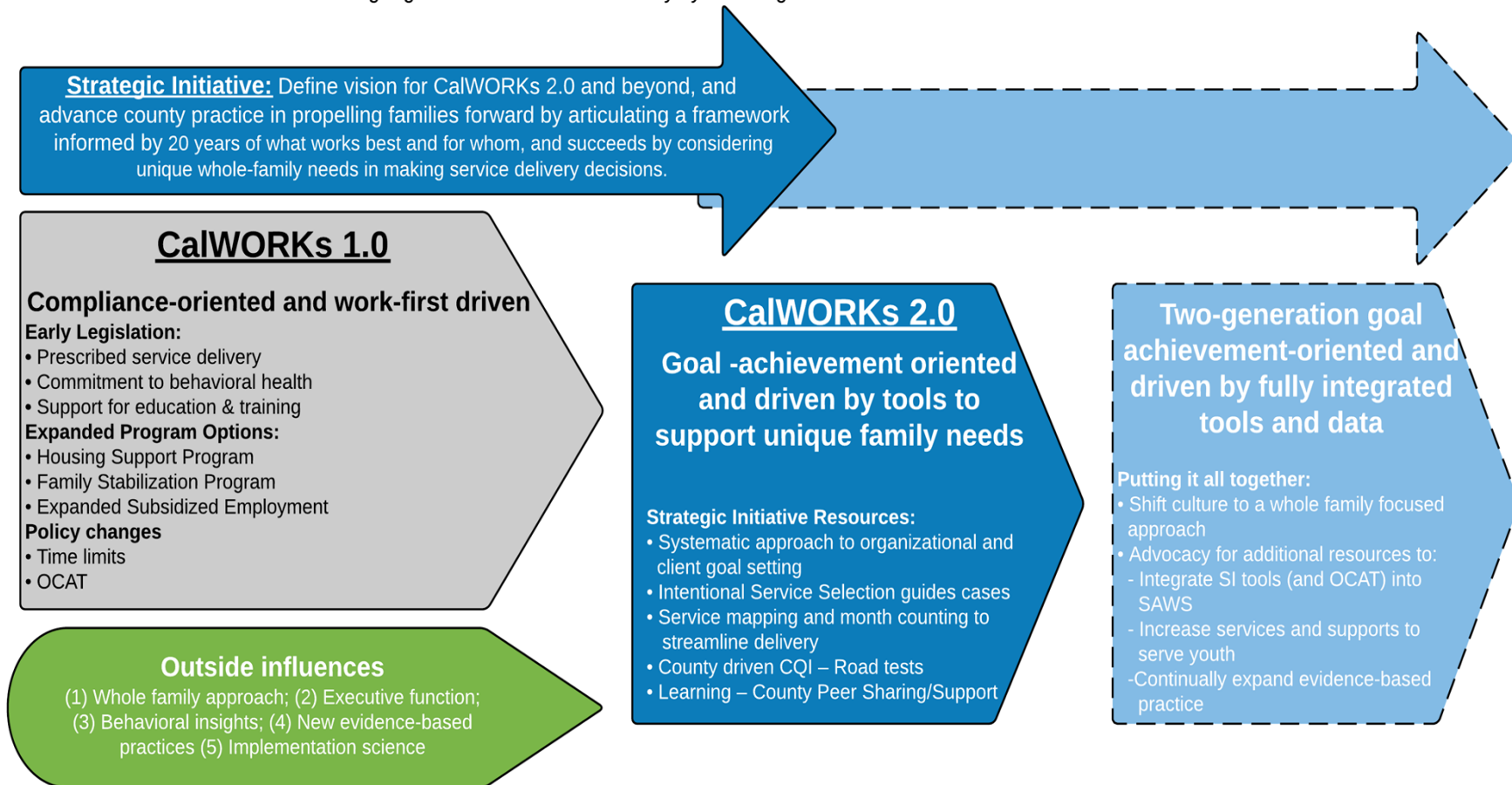
Question:

- What do you know or have you already heard about the CalWORKs 2.0 approach and effort?
- Write your answer in the Q&A box.

Why the Move to CalWORKs 2.0?

Moving California's most vulnerable families forward

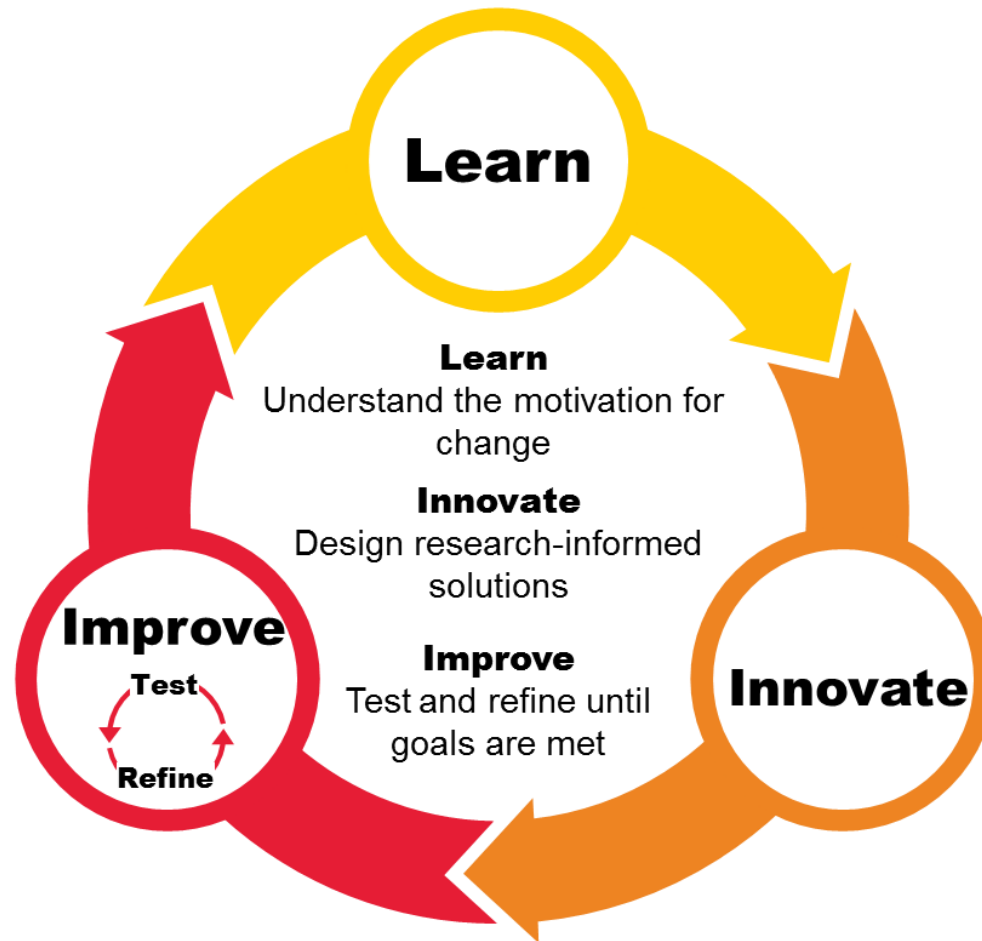
Creating a goal-oriented service delivery system to guide families toward economic and life success.



Arriving at CalWORKs 2.0

Strategic Initiative Process

Learn, Innovate, Improve (LI²)



National Insights and Implications

- **Navigating adulthood successfully requires extensive use of executive function and self-regulation skills**
- **These skills play a central role in successful goal achievement, including how we:**
 - Organize and plan
 - Get things done
 - Control how we react to things
- **Living without enough resources to make ends meet weakens these skills**
- **We can improve outcomes by accommodating executive skill deficits and providing opportunities to build them over time**
- **CalWORKs customers are parents – success at work and home are intricately linked**

Why a New Approach

New understanding of the impact of poverty on adult success

- Behavioral insights
- Increased understanding of adult core capabilities
- Shift in TANF population

Goal: Understand the California context and make program changes that reduce clients' stress, teach skills that help them succeed at work, and sequence services in a way that keeps them engaged

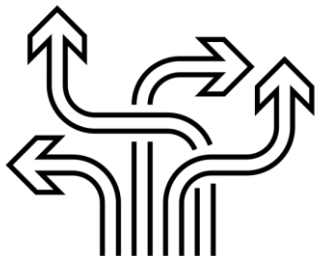
Theory: CalWORKS can fundamentally shift delivery in recognition of the need to take into account the impact of participants' work and life skills on the entire family

Needs Assessment Key Findings



Complex policy environment

- Concern about performance measures
- Varied use of state-funded initiatives
- Different state and federal policies around calculation of months



Challenges

- Compliance orientation is limiting – WPR doesn't show progress
- No framework for helping families with diverse needs
- Limited capacity to offer family-centered programming



Interests

- Family-centered approach
- Capture client progress and outcomes
- Learn creative ways to engage clients effectively

Future Vision for County Service Delivery

- Less taxing program environment: simplified processes
- Early engagement that inspires recipients to participate
- Assessment results used to create a holistic picture of a family's strength and weaknesses and make informed service choices
- Staff build supportive and responsive relationships
- Goal-setting is infused in all service delivery components
- Participant plans break goals into small steps, include details for getting the steps done, anticipate potential obstacles with strategies to overcome
- Counties set performance management goals beyond the WPR, these drive program improvement decisions

Vision and Hallmarks of CalWORKs 2.0

CalWORKs 2.0

Goal -achievement oriented
and driven by tools to
support unique family needs

Strategic Initiative Resources:

- Systematic approach to organizational and client goal setting
- Intentional Service Selection guides cases
- Service mapping and month counting to streamline delivery
- County driven CQI – Road tests
- Learning – County Peer Sharing/Support

Goal achievement: Explicitly frame service delivery around setting and achieving meaningful, realistic goals

Intentional service selection: Focus service delivery and goals around family strengths and needs; use common program activities with much greater intentionality

What Is Different

County level

- This focus invites us to think about county goals in an explicit way—moving beyond WPR to questions such as: *What is the county's ultimate outcome of interest?*
- Resources are allocated and activities emphasized to serve a case holistically.

Program activities

- We are being more explicit about the goals for each program activity: *How does each program activity contribute to overall county outcomes of interest?*
- We are identifying opportunities to model, teach and practice goal achievement in each program component.

Interactions with clients

- The focus is on concrete, short-term, meaningful goals. Goals are driven by the customer (not by the program).
- Goals lead to plans that are broken into steps systematically and specifically. Staff and clients are strategic in how to get those plans done – and thoughtful in how to review and revise as the process unfolds.

The Science of Motivation

Internal vs. external locus of control

- Motivation is born out of internal locus of control
- Choice and engagement lead to experiences that construct internal locus of control
- Internal locus of control can be “learned”

Grit is “passion and perseverance for long-term goals”

- Strategies for building grit:
 1. Pursue what interests you
 2. Practice
 3. Find purpose
 4. Have hope

(Angela Duckworth and Carol Dweck)

Intentional Service Selection

- **An updated engagement strategy that meets customers where they are, prioritizes activities based on customer needs, and succeeds through customer-centered goal setting**
- **Success in work and work-like activities is easier to achieve if customers have their basic needs met and have a voice in deciding the best path forward**
- **Depending on this starting point, entering directly into work or work-like activities may or may not be realistic**
- **ISS is about working with clients in a way that will motivate them to participate in the program and eventually transition into employment**

Why Focus on Goal Achievement?

- Grounded in science
- Compatible with key program purposes, and provides a way to enhance service delivery
- Provides a framework that can guide individual, organizational, and community goals simultaneously
- Creates a structure for measuring interim progress toward longer-term goals – especially useful for individuals with significant employment barriers
- Changes the message about CalWORKs 2.0, leading to improved engagement and motivation in CalWORKs customers
 - CalWORKs 2.0 is a program that helps families **set and achieve their goals**

The Science Behind Goal Achievement

- **Achieving a goal is an effortful process that draws on a foundational set of capacities—executive function or self-regulation skills—that help us to:**
 - Focus
 - Make decisions with information available to us
 - Set goals
 - Make and execute plans
 - Revise and adjust
 - Control impulses
- **Living in poverty degrades executive function and self-regulation skills**
 - How we design and deliver services matters
- **Evidence that process matters**
 - How goals are set
 - How plans are developed
 - When obstacles and solutions are identified
- **Today’s webinar focuses on process; the next webinar will focus on skills and poverty’s impact on them**

Our behavior lies along a continuum

Reactive
Impulsive



Proactive
Goal-directed

Right now! ← Time Orientation → Future

One ← Factors considered → Multiple

Self ← Focus → Self & others



**EFs: skills that support
goal-directed behavior**

Question:

- **What questions or comments do you have about the background and research behind the updated approach to CalWORKs?**
- **Write your answer in the Q&A box.**

CaIWORKs 2.0 Tools



Quality of Life

Multicultural Quality of Life Index

(Adapted from Mezzich, Cohen, Ruiperez, Liu & Yoon, 1999)

Name

Case Number

Instructions: Please indicate the quality of your health and life at present, from "poor" to "excellent," by placing an X on any of the ten points on the line for each of the following items:

1. Physical Well-Being (feeling energetic, free of pain and physical problems)

Poor 1 2 3 4 5 6 7 8 9 Excellent 10

2. Mental/Emotional Well-Being (feeling good, comfortable with yourself, clear headed)

Poor 1 2 3 4 5 6 7 8 9 Excellent 10

3. Self-Care and Independent Functioning (carrying out daily living tasks; making own decisions)

Poor 1 2 3 4 5 6 7 8 9 Excellent 10

4. Occupational Functioning (able to carry out work, school and parenting duties)

Poor 1 2 3 4 5 6 7 8 9 Excellent 10

5. Interpersonal Functioning (able to respond and related well to family, friends, and groups)

Poor 1 2 3 4 5 6 7 8 9 Excellent 10

6. Social-Emotional Support (availability of people you can trust and who can offer help and emotional support)

Poor 1 2 3 4 5 6 7 8 9 Excellent 10

7. Community and Services Support (pleasant and safe neighborhood, access to financial, informational and other resources)

Poor 1 2 3 4 5 6 7 8 9 Excellent 10

8. Personal Fulfillment (experiencing a sense of balance, pride and satisfaction; finding joy in life; doing things that make me happy)

Poor 1 2 3 4 5 6 7 8 9 Excellent 10

9. Spiritual Fulfillment (experiencing faith, religion or other spiritual happiness beyond my material possessions)

Poor 1 2 3 4 5 6 7 8 9 Excellent 10

10. General Perception of Quality of Life (feeling satisfied and happy with your life in general)

Poor 1 2 3 4 5 6 7 8 9 Excellent 10

For staff use only:

Average score ____

Triage Tool



CalWORKs 2.0 | Next Generation

Getting to know YOU

Name

Case Number

We are here to help you set and achieve your GOALS! As a first step we want to be sure we understand where you are coming from. This form will help us as we start to work together to get you connected with services and activities of interest to you. Please fill in both the front and back of this form. You may leave anything blank that you do not want to answer. **Thanks for answering these questions . . .**

Yes	No	Questions
<input type="checkbox"/>	<input type="checkbox"/>	1. Do you have a high school diploma or a GED?
<input type="checkbox"/>	<input type="checkbox"/>	2. Are you currently employed? If so, how many hours a week do you work? _____
<input type="checkbox"/>	<input type="checkbox"/>	3. Are you currently attending school? (if so please fill in below) Name of school: _____ School location: _____ Class schedule (please circle days(s) you attend): M T W <u>Th</u> F Sa Times: AM PM
<input type="checkbox"/>	<input type="checkbox"/>	4. Are you currently attending or would you like a referral to speak with someone about substance abuse, domestic abuse or violence, or anger management? Attending? <input type="checkbox"/> Y <input type="checkbox"/> N Would like a referral? <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Counseling <input type="checkbox"/> Help with addictions <input type="checkbox"/> Help with violence at home <input type="checkbox"/> Anger management
<input type="checkbox"/>	<input type="checkbox"/>	5. Are you participating in a transitional living program or are you currently homeless?
<input type="checkbox"/>	<input type="checkbox"/>	6. If you answered yes to questions 4 or 5, we have a program that provides free additional help to individuals and families that might benefit from a little extra support. The program is called Family Stabilization, can we tell you more about this?
<input type="checkbox"/>	<input type="checkbox"/>	7. Can you think of anything that is preventing you from participating in work and/or training related activities? If yes, what comes to mind? _____
<input type="checkbox"/>	<input type="checkbox"/>	8. Do you feel safe and stable right now? If no, why not? _____
<input type="checkbox"/>	<input type="checkbox"/>	9. Are you a current/former foster youth between the ages of 16-24?
<input type="checkbox"/>	<input type="checkbox"/>	10. Have you ever applied, or are you now in the process of applying for SSI/SSP/SDI? If yes, date applied _____ Outcome: <input type="checkbox"/> Denied <input type="checkbox"/> Approved <input type="checkbox"/> Appealing <input type="checkbox"/> Awaiting Decision

Signature

Date

CaIMAP

Life Areas		Area of significant need <i>Requires specialized services</i>	Area of need <i>Can be addressed through regular CalWORK's services</i>	Stable <i>No immediate need, but situation could use improvement</i>	Thriving <i>Area of Strength</i>	Action Plan - Resources for you
Work and education	<i>Employment</i>	Area of Significant Need	Area of Need	Stable	Thriving	
	<i>Education and skills training</i>	Area of Significant Need	Area of Need	Stable	Thriving	
Work supports	<i>Transportation</i>	Area of Significant Need	Area of Need	Stable	Thriving	
	<i>Child care</i>	Area of Significant Need	Area of Need	Stable	Thriving	
Personal and family needs	<i>Physical and mental health</i>	Area of Significant Need	Area of Need	Stable	Thriving	
	<i>Substance use</i>	Area of Significant Need	Area of Need	Stable	Thriving	
	<i>Housing</i>	Area of Significant Need	Area of Need	Stable	Thriving	
	<i>Legal</i>	Area of Significant Need	Area of Need	Stable	Thriving	
	<i>Safety</i>	Area of Significant Need	Area of Need	Stable	Thriving	
	<i>Child and family needs</i>	Area of Significant Need	Area of Need	Stable	Thriving	
	<i>Other needs</i>	Area of Significant Need	Area of Need	Stable	Thriving	

Tool: CalMAP

Life Areas		Area of significant need <i>Requires specialized services</i>	Area of need <i>Can be addressed through regular CalWORKs services</i>	Stable <i>No immediate need, but situation could use improvement</i>	Thriving <i>Area of Strength</i>
Work and education	<i>Employment</i>	Not currently employed, with limited work history	Not currently employed, but with recent work history, or in a temporary work situation that is ending in the next 60 days	Steady employment either part-time, or full-time without a sustainable wage	Steady full-time employment at a sustainable wage
	<i>Education and skills training</i>	Has no diploma, GED, or training credential or has limited English proficiency	Has no diploma or GED, but with work experience or training credential; proficient in English	Has diploma or GED, but needs additional education or training to achieve career goals; proficient in English	Has some post-secondary education or specialized training; proficient in English
Work supports	<i>Transportation</i>	Has no access to public or private transportation	Is rarely able to meet transportation needs; relies on friends and/or family	Has access to public or private transportation, but has some trouble accessing it on a regular basis	Always meets transportation needs through car, bus, or regular rides
	<i>Child care</i>	Has no access to child care	Has child care access but significant downsides in terms of reliability, accessibility, affordability and safety	Has child care access, but a few downsides in terms of reliability, accessibility, affordability and safety	Has reliable, accessible, affordable and safe child care or does not need child care
Personal and family needs	<i>Physical and mental health</i>	Has untreated physical and/or mental health needs	Has physical and/or mental health needs and inconsistent care/treatment	Has physical and/or mental health needs but is able to access treatment most of the time	Has good physical and/or mental health or has access to treatment all of the time
	<i>Substance use</i>	Currently using substances and no plans for treatment	Currently or recently (past 30 days) used substances but is in treatment or planning to enter it	Used substances in past six months, but actively engaged in treatment and no use in past 30 days	Has not used substances in the past six months
	<i>Housing</i>	Currently homeless or has eviction notice	Lives in temporary housing/shelter or is at risk for eviction	Has housing subsidy or is in low-income housing, but not in a safe location	Rents or owns in a relatively safe location; reasonable housing costs
	<i>Legal</i>	Has current significant legal issues that affect basic needs of living (such as housing, access to benefits, employability)	Has current moderate legal issues but has no assistance in addressing them	Has current moderate legal issues, but has adequate representation/legal assistance	Has no current legal issues
	<i>Safety</i>	Involved in unhealthy relationships; usually feels unsafe at home and has no support system	Involved in unhealthy relationships; sometimes feels unsafe at home, but has family and/or community support and "safe places" to go	Involved in unhealthy relationships, but is safe at home	Involved in healthy relationships and feels safe at home
	<i>Child and family needs</i>	Has household member with untreated physical and/or mental health and/or school-related needs and no care/treatment	Has household member with physical and/or mental health and/or school-related needs and inconsistent care/treatment	Has household member with physical and/or mental health and/or school-related needs but they are able to access treatment most of the time	No household members have physical and/or mental health and/or school-related needs or they have access to treatment all of the time
	<i>Other needs</i>				

My Goal Plan

My Goal-Plan-Do-Review

Name:

Date:

GOAL

What do I want to do?
Why do I want to do it?

PLAN

How will I do it? When? Where?
What might get in my way?

DO

What small first step will I take?
How will I reward myself?
Who will I check in with?

I will do it by: _____

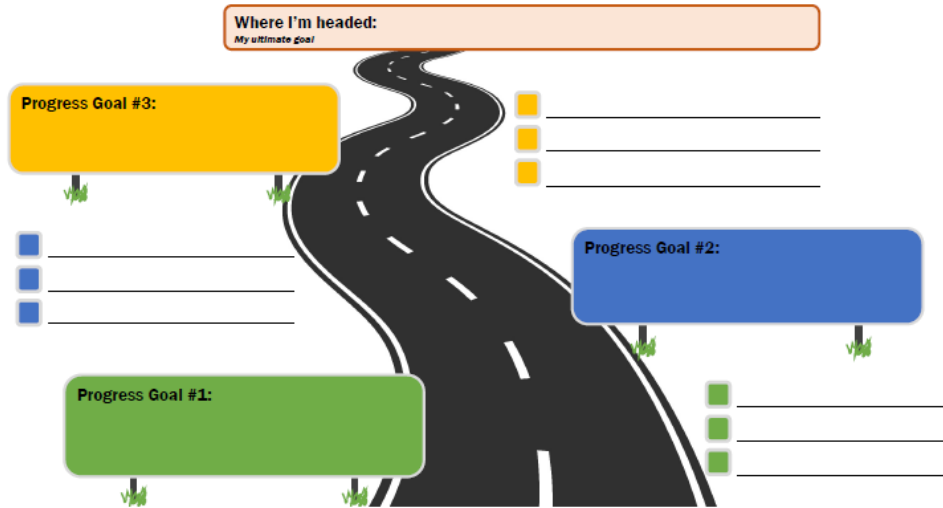
**REVIEW
REVISE**

How did it go?

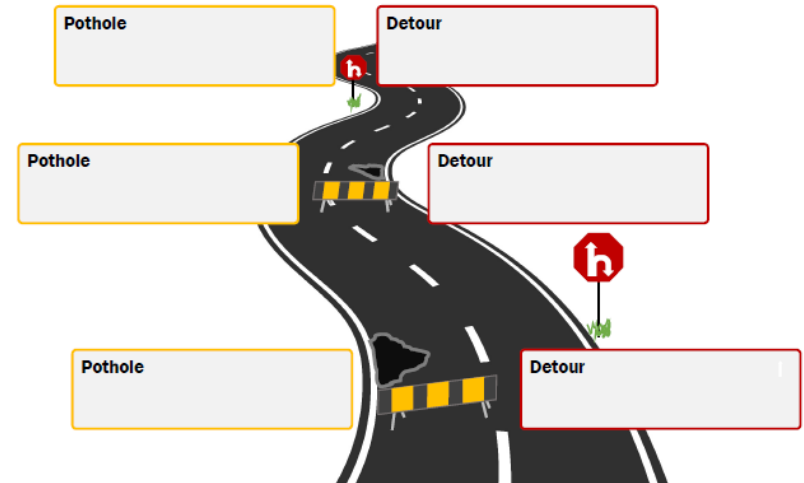
What could I do
differently next time?

Goal Achievement Tools: Thinking More Intentionally with My Roadmap

My Road Map



Potholes & Detours

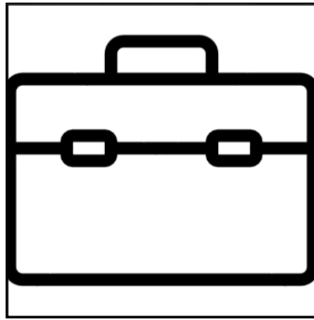


Testing the Tools

Trying It Out

- **Participating counties: Placer, Kings, Humboldt, Fresno, and Orange**
- **Staff training on reframing the OCAT, goal setting at every level, the new triage tool, quality of life measure and county-level resources**
- **Included feedback from staff and participants with every interaction**

Trying It Out: Feedback



Tools improve engagement for customers and staff

WPR and compliance are still unresolved issues



We need more non-WPR programming and training

Becoming Goal-Focused—Current Challenges

- Federally defined work activities run parallel to and are often in conflict with “personally meaningful goals”
- Assessments focus on barrier removal rather than client strengths and interests; also, they are typically past- rather than future-oriented
- Staff are often directive rather than collaborative in identifying a goal and developing a plan
- Goal planning lacks sufficient specificity, granularity, and time required for successful “doing”
- High workloads prevent frequent review of client goal progress

Question:

- How do you see this approach aligning with your own effort to serve and improve the lives of California's most vulnerable families?
- Write your answer in the Q&A box.

CalWORKs 2.0 Looking Forward

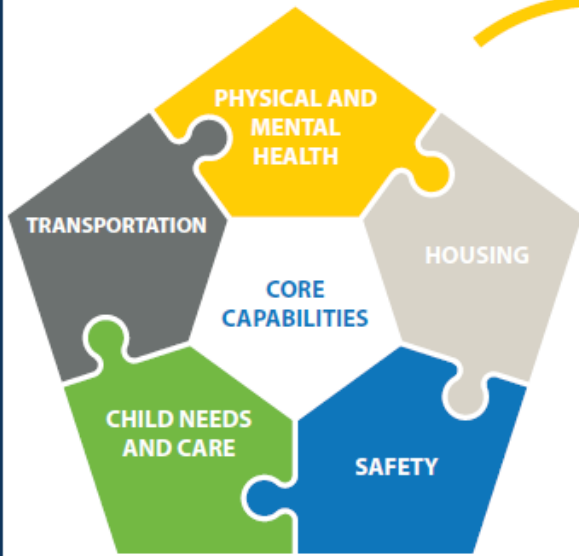
BUILD WORK-READY CUSTOMERS



ADVANCE WORK-READY CUSTOMERS

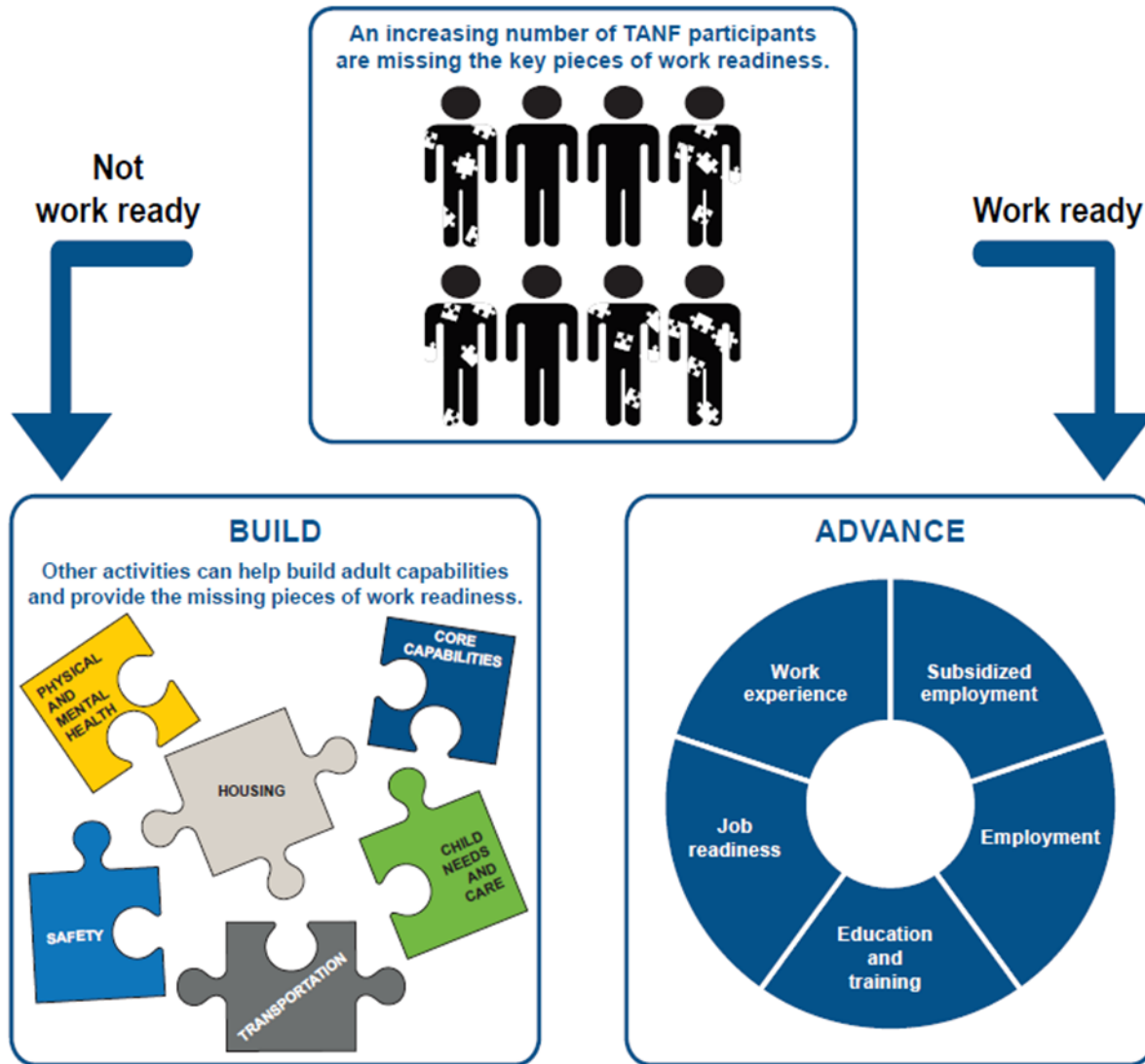


LAUNCH WORK-READY CUSTOMERS

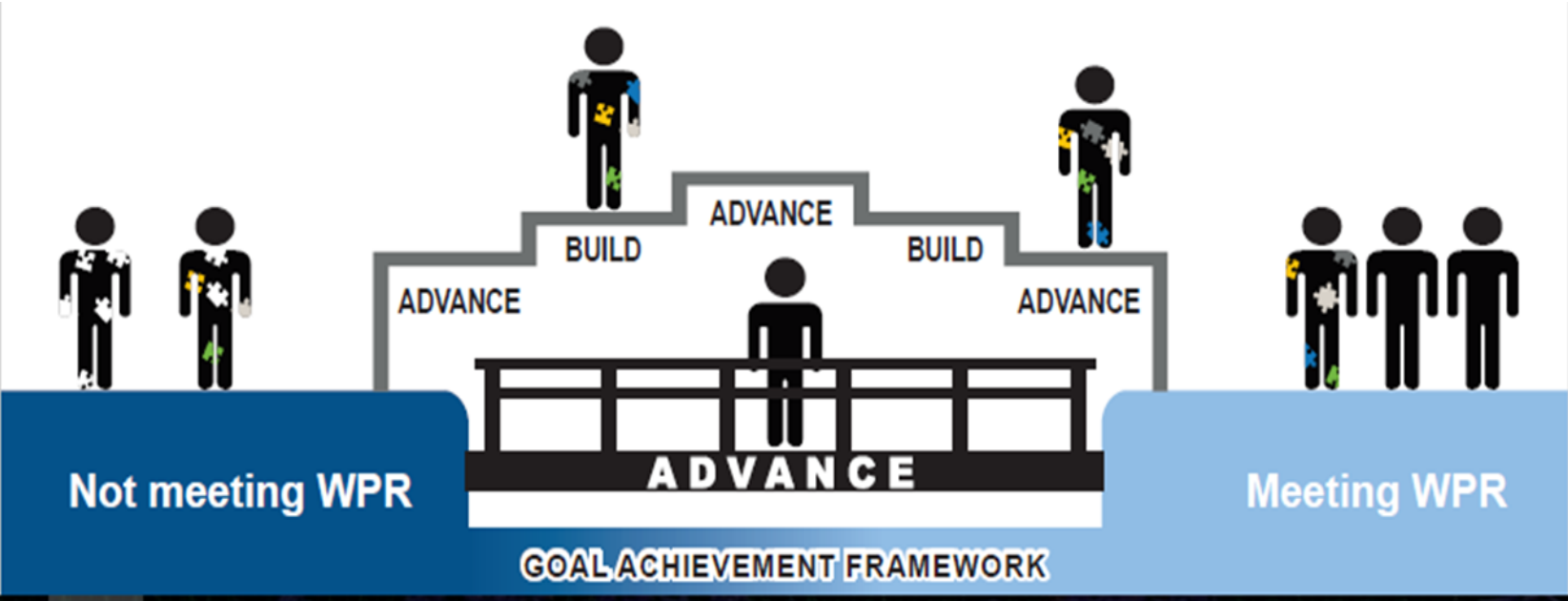


ONGOING: IMPROVE THE SERVICE ENVIRONMENT

CalWORKs 2.0: Intentional Service Selection



A New Look for Progress Measurement



Stakeholder Engagement is Key

- **Counties are engaged in critical thinking and reflection activities and are primed to incorporate meaningful suggestions and changes that:**
 - **Align with the CalWORKs 2.0 Culture Shift**
 - **Increase customer engagement**
 - **Improve meaningful ways to track customer progress**
 - **Cultivate responsive relationships with customers**

Question:

How might you like to be involved in future work with counties?

What information could you provide to counties if we facilitate a future webinar for stakeholders to share out with counties?

- Organization**
- Topics**
- Best contact**

Write your answers in the Q&A box.