Envisioning the Future

The CalWORKs Strategic Initiative

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The Strategic Initiative

Agenda

- **The Strategic Initiative - An overview**

- **Needs Assessment - Findings**

- **Project direction - Where to next**
  - CalWORKs 2.0 the vision
  - Policy framing, family prototypes, pathways to serve clients
    - Small group discussion and written feedback
    - Group discussion
  - NextGen website
    - Small group discussion and written feedback
    - Group discussion

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Learn, Innovate, Improve (LI^2)

- ## Learn
  - Identify opportunities for improvement
  - Assess readiness for change

- ## Innovate
  - Explore possibilities
  - Define the "Roadmap for Change"

- ## Improve
  - Road test and refine the intervention
  - Ensure a solid, integrated implementation

Design and Implementation Process

- **Steering Committee:** Provide direction and guidance for the vision and general oversight of the Strategic Initiative process and products

- **Direct Service Staff Workgroup:** Provide guidance on how things work in practice; provide feedback on draft tools and resources; provide ideas for new tools; road test tools and resources with a small number of participants

- **Innovation Clusters:** Counties that will co-create and/or road test interventions (often involving multiple tools and resources) before they become available statewide

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Needs Assessment Findings

How we obtained our information

- **Surveys completed by 45 of the 58 counties**

- **Telephone interviews with program administrators and specialists in 20 purposefully selected counties**

- **Visits to 6 purposefully selected counties that were not part of the telephone interviewing**

- **Focus group discussions with 33 CalWORKs clients in 3 different counties**

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Five core areas of need

- **Policies and procedures**

- **Staffing and staff development**

- **Client engagement**

- **Partnerships**

- **Data and performance metrics**

Key Findings

- **Complex policy environment leads to confusion**
  - **Confusion about federal and state policy**
  - **Lack of clarity about performance measures**

- **Lack of a framework for moving families with diverse needs and circumstances towards self-sufficiency**

- **Highly variable use of special state-funded initiatives**

- **Interest in full-family focus, limited capacity to execute**

- **Interest in developing core performance metrics and benchmarks that capture client's progress and outcomes**

Where to next ?

CalWORKs 2.0 – A vision

Clarify. Simplify. Unify.

Get everyone on the same page about priorities to help CalWORKs families

Policy map

In crisis - w/i 6 months	<---- Click Here										
Family Stabilization		**Housing**		**Mental and Behavioral Health (Included under barrier removal activities)**		**Education and Training**		**Employment**		**Child Care**	
		Needs	Services/Activities	Needs	Services/Activities	Needs	Services/Activities	Needs	Services/Activities	Circumstances	Services/Activ
Color coding Key For Services and Activities		Secured housing, but needs assistance to maintain housing: Utility Payment/Rental Assistance/Security deposit	Housing Support Program*	Managing with some continued services	Behavioral and Mental Health/Substance abuse*	Needs Post Secondary Schooling	Vocational education (12- month lifetime limit)	Ready for Unsubsidized work	Unsubsidized Employment	Exausted Post TANF 24 months and stll meets income eligibility	Stage 3
Can participate without needing to engage in other activities		Rapid Re-Housing		In treatment/intervention			Job skills training	Work ready, but unable to find unsubsidized job	Subsidized Employment	First 24 mos after leaving TANF for work	Stage 2
Can participate in these activities on a time-limited basis w/o needing to engage in other activities		Temporary/Transitional Housing		Needs Mental Health, domestic violence, substance abuse services		Needs Job Training			OJT	Stable (defined by county)	
Can participate in these activities on time-limited basis & if can't meet hr req alone must be engaged in other activities		Homeless						Needs Work Experience	Work Experience	First 6 mos on assistance and/or unstable (defined by county)	Stage 1*
Can only participate if engaged in other activities						Needs high school diploma/GED	Adult basic education		Community Service		
						Satisfactory					

Select County Services | **Service Mapping 2** | Month Counter 2 | ⊕

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Policy map

Housing		Mental and Behavioral Health (Included under barrier removal activities)		Education and Training		Employment		Child Care	
Needs	**Services/Activities**	**Needs**	**Services/Activities**	**Needs**	**Services/Activities**	**Needs**	**Services/Activities**	**Circumstances**	**Services/Activities**
Secured housing, but needs assistance to maintain housing: Utility Payment/Rental Assistance/Security deposit	Housing Support Program^	Managing with some continued services	Behavioral and Mental Health/Substance abuse^	Needs Post Secondary Schooling	Vocational education (12- month lifetime limit)	Ready for Unsubsidized work	unsubsidized employment	Exausted Post TANF 24 months and stll meets income eligibility	Stage 3
Rapid Re-Housing		In treatment/intervention			Job skills training	Work ready, but unable to find unsubsidized job	subsidized employment	First 24 mos after leaving TANF for work	Stage 2
Temporary/Transitional Housing		Needs Mental Health, domestic violence, substance abuse services		Needs Job Training			OJT	Stable (defined by county)	
Homeless				Needs high school diploma/GED		Needs Work Experience	Work Experience	First 6 mos on assistance and/or unstable (defined by county)	Stage 1*
					Adult basic education		Community Service		
				Satisfactory attendance in a secondary school		Unemployed	Job search		
						Unemployed/ not work ready	Job readiness		
							Barrier removal activities^		

Time clock calculator

24-Month Time Clock Stoppages		Also stops 48-Month Time Clock?
Minor Parent	Under 16 Years of Age	N/A
	Is a Child Attending School	N/A
	Cal-Learn Non-Head of Household	Yes
	Cal-Learn Head of Household	Yes
Preparing to engage or engaging fully	Assessment	No
	In Appraisal	No
	Development of a new work plan	No
	Job Search	No
	Meeting federal required number of participation hours	No
	VISTA Volunteer	No
Caring for young child	Pregnant and Cannot Work or Participate in WTW Activities	Yes
	Child Six Months of Age or Younger	No
	Subsequent Exemption for Child 12 Weeks of Age or Younger	No
	Child 0-23 Months of Age	Some overlap w/ 48-month exemption
Specific caregiver exemption	Excused 2nd parent	No
	60 Years of Age or Older	Yes
	Needy Non-Parent Caretaker Relative	Yes
Barrier to Engagement	Caring for Ill or Incapacitated Member of Household	Yes
	Client Disability	Yes
	Domestic Abuse	Yes
Not Engaged	Good Cause	No
	Sanctioned	Yes

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Putting families at the center of CalWORKs 2.0

Current Approach

- **Compliance-oriented**

- **Driven by state and federal policies and the work rates**

- **Influenced by Work First**

Proposed Approach

- **Goal-oriented**

- **Driven by family needs, circumstances and aspirations**

- **Influenced by evidence-based practices, behavioral insights, self-regulation and executive functioning, trauma-informed care**

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What does it mean to be compliance-oriented?

- **Rules driven decision-making and most day-to-day actions**

- **Success is defined by how well rules are followed**

- **System outcomes and goals may not be aligned with the reality of family's lives and may not be achievable**

- **Goals defined by the system, not by the individual**

- **Goals often focus on process rather than outcomes**

What does it mean to be goal-oriented?

- **Focus on what goals CalWORKs can realistically achieve within a larger vision of what is best for families**

- **System design and actions are aligned and framed around realistic and achievable goals**
  - **What are the program goals?**
  - **What are the goals for staff?**
  - **What are the goals for clients?**

- **Focus on setting benchmarks in multiple domains and for different family types that can be monitored, measured and refined**

- **Focus on segmenting the caseload based on characteristics, needs and aspirations to create common pathways – what are the paths to achieve the established goals?**

Potential Family/Service Prototypes

Families in crisis

Families with significant barriers

Families with parent desiring education and training

Families with parent seeking job and are job ready

Families with a parent who is unengaged

Examples of Program Goals (from EMPath)

Goals for a Supportive Housing Initiative

- **90% of families will pay rent on time**

- **90% of participants without a high school diploma will pass at least one test by the end of year 1 and at least three by the end of year 2**

- **75% of participants with a GED or high school diploma will successfully complete at least one semester of a post-secondary degree or a training program within 2 years**

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Example of Personal Goals (from EMPath)

- **Apply for WIC for my daughter before March 1**

- **Develop dental treatment plan for my teeth at Perfect Dental by Aug 1**

- **Pay rent on time by 5th of month for 6 months July-Sept**

- **Complete Pharm Tech program through CVS by June 18**

- **Obtain childcare for my son at Learning Center by Nov 2**

- **No pest control notifications Nov-Jan**

Example of Goal Action Plan (from EMPath)

Mobility Mentoring® Goal Action Plan   EMPath
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Goal: To save $300 over the next 6 months.

Bridge Pillar: ☐ Family Stability: Housing   ☐ Family Stability: Dependents   ☐ Well Being: Health and Behavioral Health   ☐ Well Being: Social Networks

☐ Education and Training   X Financial Management: Savings   ☐ Financial Management: Debt   ☐ Employment and Career Management

Is this a dependent-related goal?   ☐ Yes   X No   **New or Revised Goal?**   X New   ☐ Revised

Action Steps	Target Completion Date	Incentive/Reward (If none, enter N/A)	Verification Needed	Date Action Step Completed
1. Research savings account options offered at local banks and decide which is the best option for me.	1 week from today	n/a		
2. Open a bank account with $25 from my next paycheck.	2 weeks from today (aligned with my payday)	n/a	New bank account information/statement	
3. Schedule direct deposit with my employer to deposit $15 from my weekly paycheck into my new savings account. (After 19 weeks of direct deposit, $310 will be saved into account.)	3 weeks from today	n/a		
4.				
5.				
GOAL COMPLETION:	6 months from today	$25	Bank statement indicating $300 saved	
IF GOAL TARGET DATE EXTENDED, NEW TARGET COMPLETION DATE:				

Participant Signature: _____   Date: _____

Mentor/Staff Signature: _____   Date: _____

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An OCAT Profile

- **Mother of four children, ages 1-10**
- **Speaks little to no English**
- **Has never had a paying job**
- **Does not have a GED, and is uninterested in getting one**
- **Is a possible victim of human trafficking**
- **History of domestic violence**
- **In mental health counseling currently (wants to continue)**
- **Receiving housing assistance**
- **Wants to attend financial literacy workshop**
- **Wants to get cosmetology license**

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OCAT PROFILE #1	IN CRISIS- NEEDS IMMEDIATE ATTENTION	VULNERABLE- NEEDS TO BE ADDRESSED SOON OR WILL TURN INTO CRISIS	STABLE- DOING WELL, COULD USE IMPROVEMENT BUT NOT AN IMMEDIATE NEED	THRIVING- AREA OF STRENGTH
Employment	Unemployed with no work history or applicable skills.	Unemployed, but with recent work history, or in temporary work situation that is ending in next 60 days.	Currently employed at least part-time at a sustainable wage.	Has strong work history and current permanent employment.
Housing*	Currently homeless or has eviction notice.	Living in temporary housing/shelter or owes back rent (may be evicted).	Has housing subsidy or is in low-income housing, but situation is not temporary.	Rents or owns in a safe area of choice.
Transportation	No transportation or access to public transportation options.	Rarely is able to meet transportation needs, relies on friends/family.	Has access to public or private transportation, but has some trouble utilizing on a regular basis.	Always meets transportation needs through car, bus, or regular ride.
Childcare	No access to childcare, or young children are unsupervised.	Barriers exist (transportation, location, eligibility) that prohibit access to childcare.	Is able to access but has limited choices for childcare options.	Has safe, affordable childcare with adequate supervision.
Education/Skills Training	Did not graduate high school or get GED and has had no work training/experience, or cannot read/write.	Has no diploma or GED, but has work experience or training and can read/write	High school diploma or GED, but needs to improve in at least one area (math, reading, writing)	Has some form of post-secondary education or specialized training.
Health (Mental and Physical)*	Has untreated chronic health issues and no insurance or access to care.	Has ongoing medical conditions and inconsistent care/treatment.	Has ongoing health issues but has insurance and keeps most appointment/takes meds	No ongoing conditions or is proactively seeking regular treatment, gets preventative care.
Substance Use*	Currently using substances, not in treatment or planning to engage in treatment.	Current or recent (past 30 days) substance use but has entered treatment in the past 180 days.	Substance use in past 180 days (6 months), but actively engaging in treatment and no use in past 30 days.	No substance use in past 180 days (6 months)
Legal Issues*	Current legal issues affect basic needs of living (such as housing/shelter, accessing benefits), has no plan for addressing issues.	Has and understands current legal charges but has no assistance in addressing these.	Has some current legal issues but has adequate representation/legal assistance.	No history of legal issues, or past issues are fully resolved
Safety*	In abusive or dangerous relationship. Feels unsafe and has no support system.	Feels unsafe sometimes, but has family/community supports and "safe spaces" to go to.	Engages in some unhealthy relationships, but is safe at home and has access to emergency services.	Involved in healthy, stable relationships and feels safe in the community with no threat of violence/trauma.

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Feedback and discussion

Discussion questions

- **What would it take to implement a family-focused, goal-achievement approach?**

- **What will get in your way?**

Website
CalWORKs 2.0 Next Generation

The Website

- **Key promise to users**
  - **This website will give staff at the county level an easy way to hear from other counties**
  - **Users will feel they are part of a "virtual working group" and are brainstorming with peers in other counties**
  - **The website will be a useful complement to other in-person and virtual events at which staff exchange insights and questions about CalWORKs 2.0**

The Website

- **Anticipated obstacles**
  - **Staff are hard at work on their day-to-day tasks, and will find it difficult to divert time to engage on the website**
  - **Staff might not even think to look to the site**
  - **Staff may be reluctant to openly share challenges or to flag innovations**

The Website

- **Tone/look/feel**

  - **It will feel up-to-date and pertinent**

  - **The site will feel intimate ("just us") and practical-quick access to handy resources**

  - **The site will be inviting and relaxed. Staff should not feel judged about posting challenges, asking questions, or engaging with other counties using quick comments or forum posts**
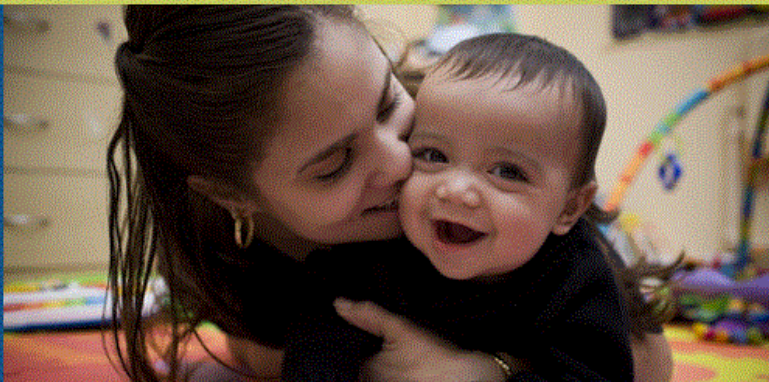
CalWORKs 2.0 (Next Gen) Website

How we hope to engage you

1. Get your feedback today about how to best design a website for you

2. Offer quarterly interactive webinars in which users get on the site and work with CalWORKs SI team and other counties

3. Send monthly communications with high-interest content to encourage accessing and engaging with the site

4. Use push notifications to inform site participants of new forum topics or posts to solicit responses and engagement

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Feedback and discussion

Discussion questions

- **Thinking about ways in which you've used technology to share or gather information from colleagues, what would be the most useful format for us to integrate to NextGen to facilitate collaborative learning community?**

- **What content would make you excited about using the new NextGen website?**

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