

# CaIWORKs Strategic Initiative

## Insights from the CaIWORKs 2.0 Road Tests

---

2017 CWDA Annual Conference  
Sacramento, CA  
October 4, 2017  
1:20 – 2:50 PM

---

Noelle Simmons, SF County  
Natasha Nicolai, Mathematica

Marti Hufft, Humboldt County  
Stephanie Navarro, Fresno County

---

# The Strategic Initiative

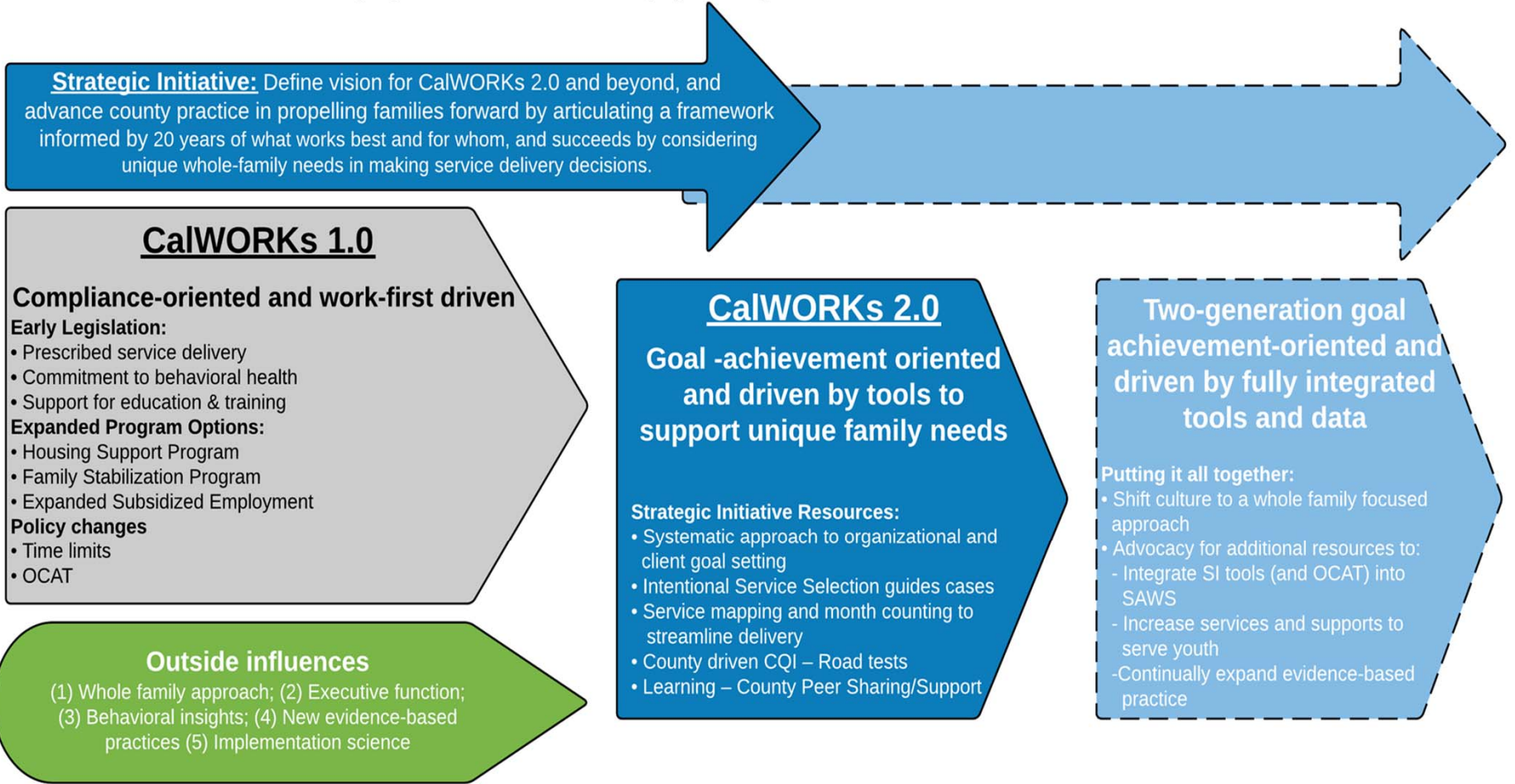
# Agenda

---

- **CalWORKs 2.0 – Hallmarks and design**
- **Road Testing with County Partners – Lessons learned**
  - The road test process
  - Collaborating with the counties
    - Strategic planning insights
    - Tool selection and incorporation
  - Staff training and skill building
    - Updated messaging
    - Reframing the worker-customer relationship
  - Insights for case flow and customer engagement
    - Learning about the customer and goal setting
    - Intentionality in engagement and service selection
- **Discussion – Q & A**
- **What's next for the strategic initiative**

# Moving California's most vulnerable families forward

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

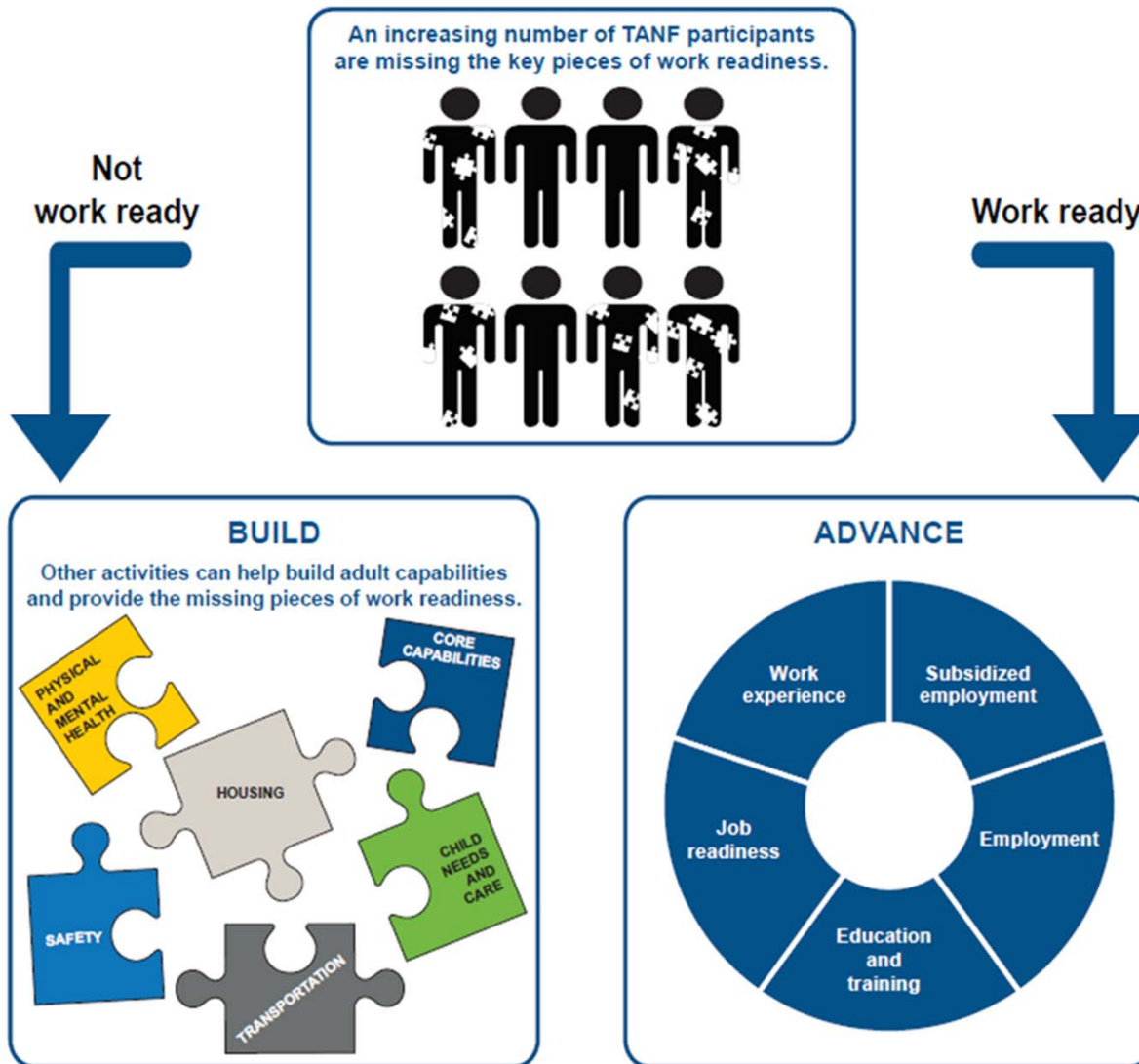


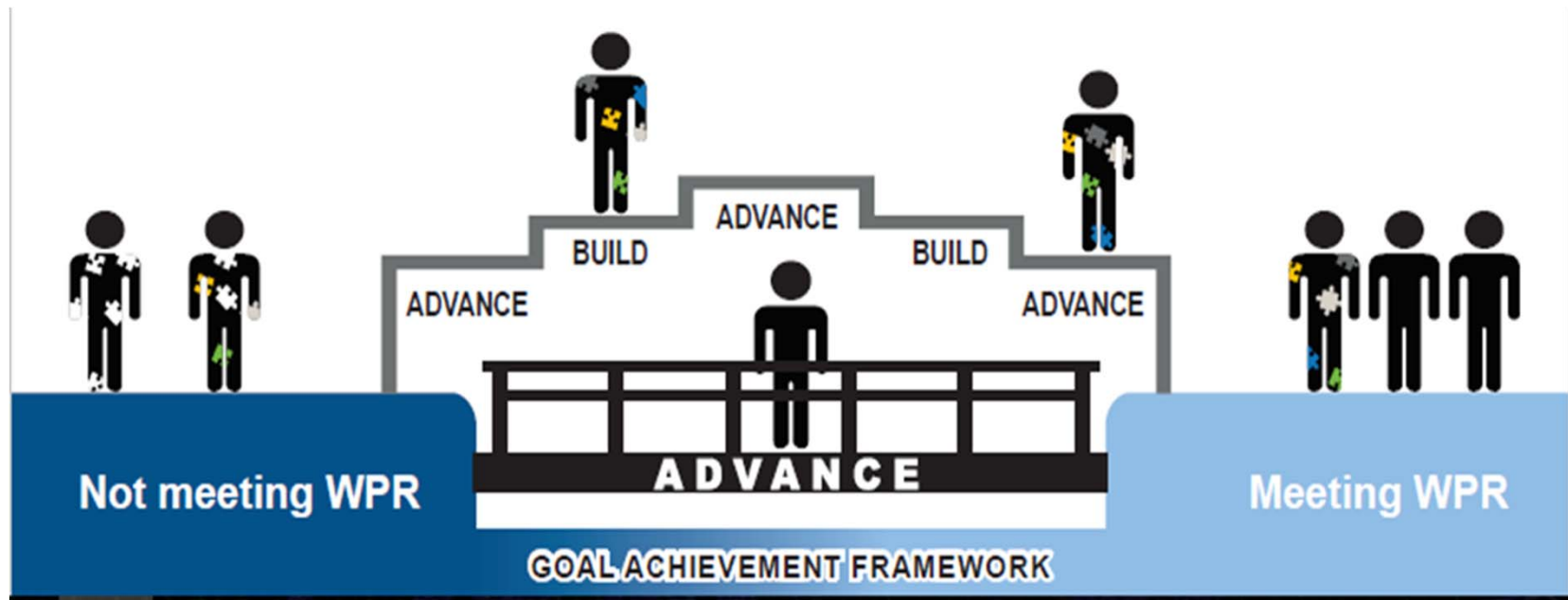
# National Insights and Implications

---

- **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**

# CalWORKs 2.0: Intentional Service Selection





# 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

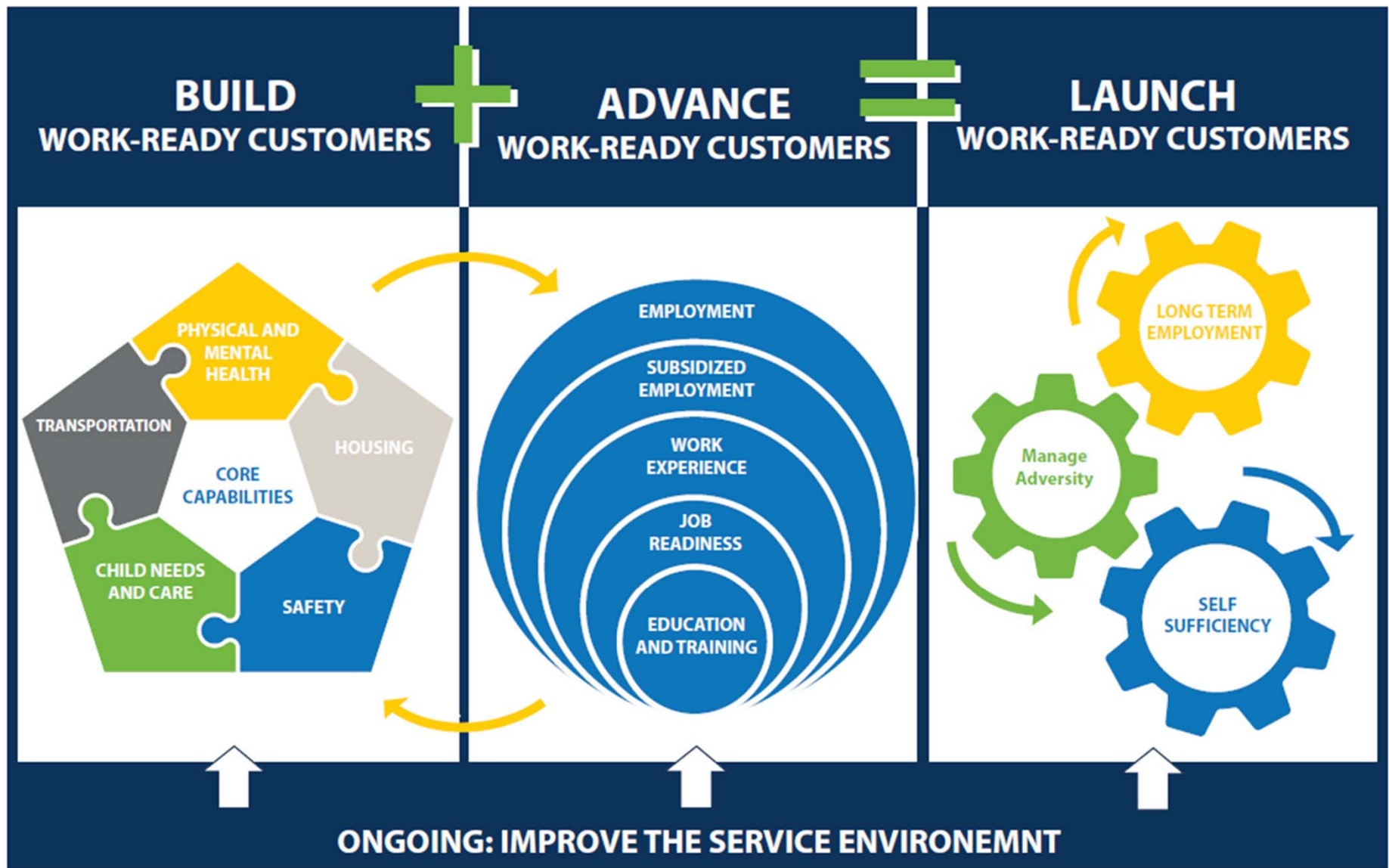
**Intentional service selection:** Focus service delivery and goals around family strengths and needs; use common program activities with much greater intentionality



# Why is CalWORKs 2.0 Different

---

- **New understanding of the impact of poverty on adult success**
  - Behavioral insights: Living under conditions of scarcity taxes the attentional resources needed to find and maintain work or succeed in school
  - “Self-regulation” and “Executive function”: Skills needed to be successful in work -- planning, organization, task initiation, persistence -- are weakened by exposure to poverty early in life and by ongoing stress, poor nutrition, and lack of social connections
  - Recognition that increasingly participants are entering TANF not work ready, and putting participants into work-first activities is not sufficient to engage clients leading to increased sanctions
- **But: These skills can be learned!**
- **And: A fundamental shift in CalWORKs delivery can increasingly recognize that we must take into account the entire family and not just the participant**



# New Tools Developed

---



# Triage Tool



## 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 Th 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



# Quality of Life

## Multicultural Quality of Life Index

(Adapted from Mezzich, Cohen, Ruyter, 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:

- Physical Well-Being (feeling energetic, free of pain and physical problems)**  
 Poor 1 2 3 4 5 6 7 8 9 Excellent 10
- Mental/Emotional Well-Being (feeling good, comfortable with yourself, clear headed)**  
 Poor 1 2 3 4 5 6 7 8 9 Excellent 10
- 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
- Occupational Functioning (able to carry out work, school and parenting duties)**  
 Poor 1 2 3 4 5 6 7 8 9 Excellent 10
- 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
- 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
- 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
- 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
- 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
- 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 \_\_\_\_

# CaIMAP

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	Employment	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
	Education and skills training	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	Transportation	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
	Child care	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	Physical and mental health	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
	Substance use	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
	Housing	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
	Legal	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
	Safety	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
	Child and family needs	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
	Other needs				

# CaIMAP

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>	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	

# 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**

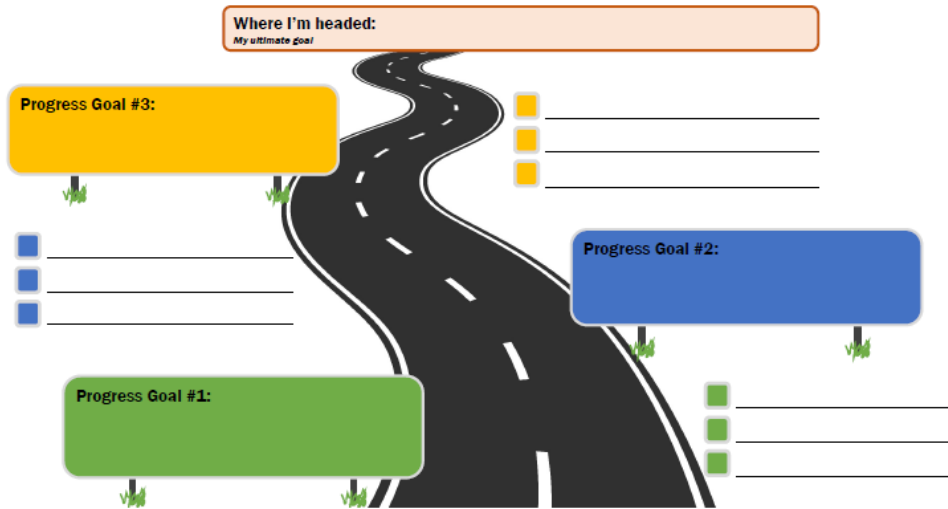
How did it go?

What could I do  
differently next time?

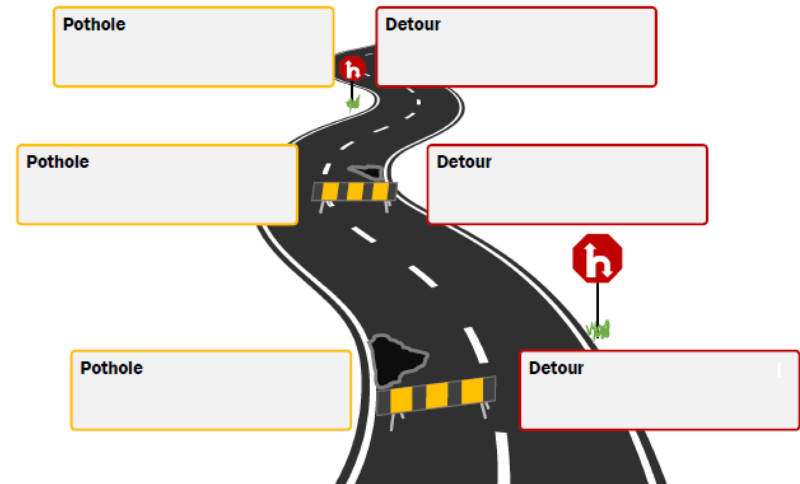


# Goal Achievement Tools: Thinking More Intentionally with My Roadmap

## My Road Map



## Potholes & Detours



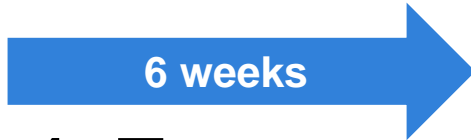
# Trying It Out

---

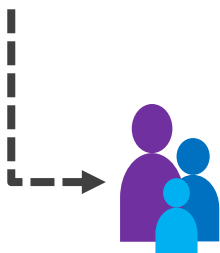
- **Participating counties: Placer, Kings, Humboldt, and Fresno**
- **Staff training on reframing the OCAT, goal setting at every level, the new triage tool, and county-level resources**
- **If you haven't already, view the videos highlighting Placer and Kings County's experience trying out the tools on the CalWORKs stories page of the new website**

# Road Test Approach (Example)

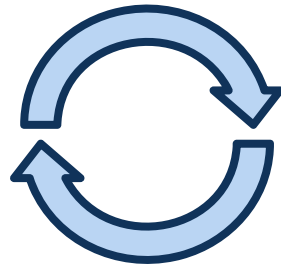
Cohort 1



4-7 staff



6-10 Clients each

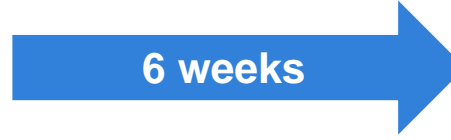


ANALYZE feedback

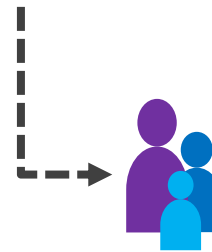
REVISE tools/supports

REFINE the process

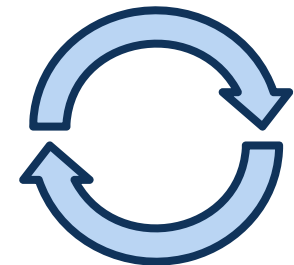
Cohort 2



4-7 staff



6-10 Clients each



ANALYZE feedback

REVISE tools/supports

REFINE the process

---

# Hearing from the counties

# Collaborating with the counties

---

- **Strategic planning insights**
- **Tool selection and incorporation**

# Staff training and skill building

---

- **Updated messaging**
- **Reframing the worker-customer relationship**

# Insights for case flow and customer engagement

---

- **Learning about the customer and goal setting**
- **Intentionality in engagement and service selection**

---

# Questions?





---

What's next

# Looking ahead

---

- **Finalizing tools in November and December**
- **Training and culture shift to start with directors in December, and then deputy directors and program managers in January (in-person)**
- **Facilitated training for frontline staff (webinar series)**
- **Supported implementation in stages through county clusters with intensive implementation technical assistance from team weekly**
- **In-person county convening and forum to provide feedback and get additional training supports**

# For More Information

---

- **Natasha Nicolai, Mathematica**
  - [Nnicolai@mathematica-mpr.com](mailto:Nnicolai@mathematica-mpr.com)
- **Noelle Simmons, SF County**
  - [Noelle.simmons@sfgov.org](mailto:Noelle.simmons@sfgov.org)