CalWORKs Strategic Initiative

Insights from the CalWORKs 2.0 Road Tests

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

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Natasha Nicolai, Mathematica

Marti Hufft, Humboldt County
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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.

**Strategic Initiative:** Define vision for CalWORKs 2.0 and beyond, and advance county practice in propelling families forward by articulating a framework informed by 20 years of what works best and for whom, and succeeds by considering unique whole-family needs in making service delivery decisions.

**CalWORKs 1.0**
Compliance-oriented and work-first driven

- **Early Legislation:**
  - Prescribed service delivery
  - Commitment to behavioral health
  - Support for education & training

- **Expanded Program Options:**
  - Housing Support Program
  - Family Stabilization Program
  - Expanded Subsidized Employment

- **Policy changes**
  - Time limits
  - OCAT

**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

**Two-generation goal achievement-oriented and driven by fully integrated tools and data**

- Putting it all together:
  - Shift culture to a whole family focused approach
  - Advocacy for additional resources to:
    - Integrate SI tools (and OCAT) into SAWS
    - Increase services and supports to serve youth
    - Continually expand evidence-based practice

**Outside influences**
(1) Whole family approach; (2) Executive function; (3) Behavioral insights; (4) New evidence-based practices; (5) Implementation science
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

An increasing number of TANF participants are missing the key pieces of work readiness.

Not work ready → Work ready

BUILD
Other activities can help build adult capabilities and provide the missing pieces of work readiness.

ADVANCE
- Work experience
- Subsidized employment
- Education and training
- Job readjustment
- Employment
Vision and Hallmarks of CalWORKs 2.0

**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

**CalWORKs 2.0**
Goal -achievement oriented and driven by tools to support unique family needs

Strategic Initiative Resources:
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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

01 ELIGIBILITY
Update Outreach Materials
1-page Triage Tool

02 ENGAGE CUSTOMER
Clarify Messaging
CalWORKS 2.0 Orientation

03 GET STARTED
CalMAP Tool

04 SELECT INITIAL ACTIVITIES
Goal Setting In All Activities
Intentional Service Selection Guidelines

05 SET GOALS
My Roadmap, Potholes and Detours

06 TRACK PROGRESS
CalMAP Tool and Goal Setting Tools
# Triage Tool

**Getting to know YOU**

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 . . .**

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>1. Do you have a high school diploma or a GED?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Are you currently employed? if so, how many hours a week do you work?</td>
</tr>
</tbody>
</table>
|     |    | 3. Are you currently attending school? (If so please fill in below)  
|     |    | Name of school:  
|     |    | School location:  
|     |    | Class schedule (please circle day(s) you attend):  
|     |    | 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?  
|     |    | Would like a referral?  
|     |    | Counseling  
|     |    | Help with addictions  
|     |    | Help with violence at home  
|     |    | Anger management  
|     |    | 5. Are you participating in a transitional living program or are you currently homeless? |
|     |    | 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? |
|     |    | 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? |
|     |    | 8. Do you feel safe and stable right now? If no, why not? |
|     |    | 9. Are you a current/former foster youth between the ages of 16-24? |
|     |    | 10. Have you ever applied, or are you now in the process of applying for SSI/SSP/SDI?  
|     |    | If yes, date applied  
|     |    | Outcome:  
|     |    | Denied  
|     |    | Approved  
|     |    | Appealing  
|     |    | Pending Decision  

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**Signature**

**Date**
Quality of Life

Multicultural Quality of Life Index

Adapted from Mezlich, Cohen, Ruiz Perez, Liu, & Yoon, 1999

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 ___ ___
## CalMAP

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

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**14**
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Goal Achievement Tools: Thinking More Intentionally with My Roadmap

My Road Map

Where I’m headed:
my ultimate goal

Progress Goal #3:

Progress Goal #2:

Progress Goal #1:

Potholes & Detours

Pothole

Detour

Pothole

Detour

Pothole
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

6 weeks

4-7 staff

6-10 Clients each

ANALYZE

feedback

REVISE

tools/supports

REFINE

the process

Cohort 2

6 weeks

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

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