CalWORKs 2.0 and Your County

What 2.0 means for frontline staff

CDSS CalWORKs Academy

December 6, 2017

Natasha Nicolai, Mathematica • Noelle Simmons, SF County • Maria Rodriguez-Lopez, Kings County • Jamie Sweeney, Placer County • Jamie Pellow, Placer County
Facilitators

Natasha Nicolai, Mathematica
Noelle Simmons, SF County

Maria Rodriguez-Lopez, Kings County

Jamie Sweeney, Placer County
Jamie Pellow, Placer County
Today we will:

• Provide an overview of the CalWORKs Strategic Initiative
• Review the constructs and hallmarks of CalWORKs 2.0
• Provide an overview of county and frontline CalWORKs 2.0 tools and resources
• Review each frontline tool in detail and hear from road test counties about their experience with each tool
• Provide an overview of a county’s experience taking CalWORKs 2.0 to scale
The Strategic Initiative and Vision for 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.

**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
**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:**
- 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
Why a New Approach

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 succeed at 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 many participants who enter TANF are not work ready, and that putting these participants into work-first activities is not sufficient to engage them and can lead to increased sanctions

But: We can 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

And: 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
What Is Different

CalWORKs 2.0 is reframing the possibilities

– From transactional relationships to supportive relationships
– From information overload to streamlined messages
– From “we think this might work” to “the brain research says”
– From “here is what we offer” to “here is how we help you achieve your goals”
– From WPR to expanded measures of success
Future Vision for County Service Delivery

- Less taxing program environment: simplified processes and forms reduce participation burden
- Redesigned orientation presents new CalWORKs vision and inspires recipients to participate
- Assessment results used to create a holistic picture of a family’s strength and weaknesses and make informed service delivery choices
- Direct service staff build supportive relationships to help participants set and achieve meaningful and achievable goals
- 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 and include strategies for overcoming obstacles
- Counties set performance management goals beyond the WPR that are used for ongoing program monitoring and improvement
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
Job readiness
Education and training
Employment
Frontline 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
County-Level Tools: “A.R.C.”

• Assessment:
  – County Self-Assessment
  – Resource Guide

• Reflection:
  – County Goal Setting Guide
  – CalWORKs 2.0 Staff Description

• Culture Change:
  – County Goal Setting Guide
  – Intentional Service Selection
  – Goal Achievement Framework
The Science Behind CalWORKs 2.0
What Do We Mean by Goal Achievement?

• We use goal achievement to refer to the process that individuals go through to achieve an outcome that wouldn’t occur without effort and specific direction.
Why Focus on Goal Achievement?

- Grounded in science

- Compatible with key program purposes, but 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
Intentional Service Selection

INTENTIONAL SERVICE SELECTION:
THE RIGHT SERVICES FOR THE RIGHT CLIENTS

BUILD

ADVANCE

LAUNCH
WORK-READY CUSTOMERS

ONGOING: IMPROVE THE SERVICE ENVIRONMENT

MATHЕMATICA
Policy Research

19
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
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)
Executive Function and Self-Regulation Skills

Skills we use to organize and plan
• Time management
• Organization
• Planning/prioritization

Skills we use to get things done
• Task Initiation
• Goal-directed persistence
• Working memory
• Sustained attention
• Stress tolerance

Skills we use to control how we react to situations
• Response inhibition
• Flexibility
• Metacognition
• Emotional control
Factors that Impair the Executive Functions that are Necessary for Goal Achievement

- Stress
- Lack of sleep
- Lack of exercise
- Sadness
- Loneliness
- Poor nutrition

If we ignore that someone is stressed, lonely, or not healthy because of poor nutrition, lack of sleep or lack of exercise, those unmet needs will work against that person exercising the executive functions s/he needs to function properly at work and at home.

Adele Diamond

University of British Columbia
How Can We Improve Executive Function Skills?

• Work on reducing things that impair executive functions such as stress, lack of connections and lack of sleep

• Find ways to reduce the demands on executive function skills (e.g., change the environment, provide tools to make the task easier --like using a cellphone app for reminders; folders for organizing documents)

• Work on explicitly building EF skills: break them into small steps, train them, challenge them and practice them in the context in which they will be used
How Excessive Stress Affects Core Capabilities

Automatic Self-Regulation

Intentional Self-Regulation

Stimulus

Attention

REQUIRES Executive Function

How Excessive Stress Affects Core Capabilities
How We Can Strengthen or Restore These Capabilities

Two approaches can reset the balance of self-regulation in adulthood.

- Streamline application forms and processes.
- Create accessible materials in many formats.
- Use clear language and break down tasks into steps.
- Bundle together services, funding, and applications from different agencies and providers.
- Eliminate barriers to program reentry.
Insights from Behavioral Economics

• Living in poverty means living in chronic scarcity

• Living under the conditions of scarcity imposes a “bandwidth tax” which reduces the cognitive resources that individuals have available to devote to activities aimed at achieving long-term goals

• Researchers liken living in poverty to living perpetually on a missed night of sleep

• The impact of the bandwidth tax (and living on a missed night of sleep):
  – Reduces capacity to think logically and analyze and solve novel problems and process information
  – Diminishes ability to evaluate options and make high-quality decisions
  – Impairs self-control, often leading to impulsivity
Strategies to Lessen the “Bandwidth Tax”

• **Reduce the costs you impose on clients**
  – Make communication clear and actionable
  – Reduce barriers to entry (simplify, streamline and make processes as simple as possible)

• **Create slack**
  – Value time as money
  – Be unconditionally generous – provide more of what families lack

• **Reframe and empower**
  – Destigmatize service and benefits
  – Promote constructive interpersonal interactions
  – Put decision making back in their hands
The Important Role You Play

“We contend that the burden of change rests primarily with the individuals and organizations who have the power to design programs and systems in ways that take universal tendencies into account.”

--Ideas42, Poverty Interrupted
The Tools and Resources
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>
<tr>
<td></td>
<td></td>
<td>3. Are you currently attending school? (If so please fill in below)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Name of school: ____________________________</td>
</tr>
<tr>
<td></td>
<td></td>
<td>School location: ___________________________</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Class schedule (please circle days[s] you attend): M T W Th F Sa Times: AM PM</td>
</tr>
<tr>
<td></td>
<td></td>
<td>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?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Attending? ☐ Y ☐ N Would like a referral? ☐ Y ☐ N</td>
</tr>
<tr>
<td></td>
<td></td>
<td>☐ Counseling ☐ Help with addictions ☐ Help with violence at home ☐ Anger management</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. Are you participating in a transitional living program or are you currently homeless?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>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?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>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? ___________________________</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8. Do you feel safe and stable right now? If no, why not? ___________________________</td>
</tr>
<tr>
<td></td>
<td></td>
<td>9. Are you a current/former foster youth between the ages of 16-24?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>10. Have you ever applied, or are you now in the process of applying for SSI/SSDI?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If yes, date applied ___________________</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Outcome: ☐ Denied ☐ Approved ☐ Appealing ☐ Awaiting Decision</td>
</tr>
</tbody>
</table>

| Signature | Date |

Mathematica Policy Research
Triage Tool

• Purpose: Get a very quick snapshot of what client’s immediate needs and desires are

• Should be tailored to case flow of the county and the services available

• This tool is useful for specialized worker models
## Multicultural Quality of Life Index

(Adapted from Mezich, Cohen, Ruiperez, 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:

<table>
<thead>
<tr>
<th>Item</th>
<th>Poor</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Physical Well-Being (feeling energetic, free of pain and physical problems)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Mental/Emotional Well-Being (feeling good, comfortable with yourself, clear headed)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Self-Care and Independent Functioning (carrying out daily living tasks; making own decisions)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Occupational Functioning (able to carry out work, school and parenting duties)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Interpersonal Functioning (able to respond and related well to family, friends, and groups)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Social-Emotional Support (availability of people you can trust and who can offer help and emotional support)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Community and Services Support (pleasant and safe neighborhood, access to financial, informational and other resources)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Personal Fulfillment (experiencing a sense of balance, pride and satisfaction; finding joy in life; doing things that make me happy)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Spiritual Fulfillment (experiencing faith, religion or other spiritual happiness beyond my material possessions)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. General Perception of Quality of Life (feeling satisfied and happy with your life in general)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For staff use only:
Average score ___
Quality of Life

• Purpose: Get a holistic sense of how clients assess their own quality of life – insights into new life areas

• 10 life areas designed to be broad and encompassing

• This tool is a valid and reliable measure over time

• Responses are not normalized across clients and should rather be seen as a snapshot in time, unique to the client

• Similar to the CalMAP, workers can ask client’s to reflect on a response or say more about why they chose it – giving worker additional client insights
Triage Tool/ Quality of Life

• Together these tools provide potentially critical information about customers to help workers immediately meet them where they are at.

• Good place for eligibility staff to be more integrated into the CalWORKs 2.0 engagement strategy.

• QOL provides a holistic benchmark for staff to track over time.

• Note: It is critical that this information is communicated amongst staff to avoid clients duplicating information sharing.
A Word from the Counties
<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>
</tr>
</thead>
<tbody>
<tr>
<td>Work and education</td>
<td>Employment Not currently employed, with limited work history</td>
<td>Not currently employed, but with recent work history, or 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>
</tr>
<tr>
<td></td>
<td>Education and skills training Has no diploma, 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>
</tr>
<tr>
<td></td>
<td>Transportation 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>
</tr>
<tr>
<td></td>
<td>Child care 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>
</tr>
<tr>
<td></td>
<td>Physical and mental health Has untreated 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 physical and/or mental health or has access to treatment all of the time</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Substance use 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>
</tr>
<tr>
<td></td>
<td>Housing Currently homeless or has eviction notice</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>
</tr>
<tr>
<td>Personal and family needs</td>
<td>Legal 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>
</tr>
<tr>
<td></td>
<td>Safety 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 &quot;safe places&quot; 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>
</tr>
<tr>
<td></td>
<td>Child and family needs 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 but 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>
</tr>
<tr>
<td></td>
<td>Other needs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Life Areas</td>
<td>Area of significant need</td>
<td>Area of need</td>
<td>Stable</td>
<td>Thriving</td>
</tr>
<tr>
<td>----------------------------</td>
<td>--------------------------</td>
<td>--------------</td>
<td>--------</td>
<td>----------</td>
</tr>
<tr>
<td>Work and education</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employment</td>
<td>Area of Significant Need</td>
<td>Area of Need</td>
<td>Stable</td>
<td>Thriving</td>
</tr>
<tr>
<td>Education and skills training</td>
<td>Area of Significant Need</td>
<td>Area of Need</td>
<td>Stable</td>
<td>Thriving</td>
</tr>
<tr>
<td>Transportation</td>
<td>Area of Significant Need</td>
<td>Area of Need</td>
<td>Stable</td>
<td>Thriving</td>
</tr>
<tr>
<td>Work supports</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child care</td>
<td>Area of Significant Need</td>
<td>Area of Need</td>
<td>Stable</td>
<td>Thriving</td>
</tr>
<tr>
<td>Physical and mental health</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Substance use</td>
<td>Area of Significant Need</td>
<td>Area of Need</td>
<td>Stable</td>
<td>Thriving</td>
</tr>
<tr>
<td>Housing</td>
<td>Area of Significant Need</td>
<td>Area of Need</td>
<td>Stable</td>
<td>Thriving</td>
</tr>
<tr>
<td>Legal</td>
<td>Area of Significant Need</td>
<td>Area of Need</td>
<td>Stable</td>
<td>Thriving</td>
</tr>
<tr>
<td>Safety</td>
<td>Area of Significant Need</td>
<td>Area of Need</td>
<td>Stable</td>
<td>Thriving</td>
</tr>
<tr>
<td>Child and family needs</td>
<td>Area of Significant Need</td>
<td>Area of Need</td>
<td>Stable</td>
<td>Thriving</td>
</tr>
<tr>
<td>Other needs</td>
<td>Area of Significant Need</td>
<td>Area of Need</td>
<td>Stable</td>
<td>Thriving</td>
</tr>
</tbody>
</table>
Purpose: Assess clients’ strengths and needs; identify changes over time

11 life areas organized into 3 categories:
- Work and education
- Work supports
- Personal and family needs

In discussion with the client, the client rates areas in their own life as:
- Area of significant need
- Area of need
- Stable
- Thriving
A Word from the Counties
Goal, Plan, Do, Review/Revise: A Science-Informed Approach to Goal Achievement
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: Something We Want to Accomplish

• Characteristics of “good” goals
  – Personally meaningful
  – Challenging but within reach
  – Well defined

• Strategies for achieving goals that stick
  – Start with the future
  – Imagine what the future looks and feels like
  – Write goals down; keep them visible
  – Start small
Plan: Creating a Road Map for Change

• Three steps for developing effective plans
  – Break big goals down into small, manageable steps (backward mapping)
  – Develop specific and targeted action plans
  – Identify obstacles and strategies for responding to them before they occur

• Characteristics of effective plans:
  – Identify action steps and resources needed
  – Written down
  – The more detailed, the better: what, when, where, how
  – Streamlined to have as few steps as possible
  – Obstacles and responses to them written down and/or rehearsed: “If….then”
Do: Put the Plan Into Action

- Executing the plan is in the hands of the participant
- Well-designed goal-setting and planning processes increase the chance of successful execution
  - Create positive motivation: meaningful goals; visualizing the outcome
  - Make plans feasible: small steps; detailed action plans
  - Anticipate obstacles: “If…then” plans
- Strategies for providing additional support
  - Walk through the action plan with the participant
  - Help participants set up their own reminders
  - Provide reminders via email, text or phone calls
  - Encourage teamwork
  - Provide opportunities to practice difficult tasks
  - Help participants come up with strategies to make unpleasant tasks less unpleasant
Review and Revise: Stepping Back, Moving Forward

• We rarely get goals or plans right on the first try

• Opportunity to create an ongoing learning opportunity and build skills

• Review
  – Strengths-based: What went well?
  – Forward-looking: What didn’t go as planned? What got in the way?
  – Learning: What did you learn about yourself?

• Revise
  – Updated action steps
  – New plan
  – New goal
Structured Approach to Goal Achievement: Goal, Plan, Do, Review and Revise

- **Goal**
  - Something we want to do to make our lives better or more fulfilling
  - Meaningful and within reach, with some effort

- **Plan**
  - A break down of the steps to achieve the goal
  - Responds to anticipated obstacles

- **Do**
  - Putting our plan into action
  - Identifying what supports are needed

- **Review**
  - Regularly checking how things are going: What’s gone well? Where are we stuck? What went wrong?

- **Revise**
  - Making changes to goals, plans and supports needed in response to progress that has been made (or not made); goes hand-in-hand with “review”
Goal Storming

Life in 3 Months

I would like my life to be different . . .

Action Steps

To make the change, it would take . . .

Resources

Some things that would help me succeed . . .
Thinking bigger: “Ultimate” goal setting
The My Roadmap and Potholes and Detours

**Purpose:** My Roadmap is a goal-setting and planning tool. It helps clients think about where they are starting from, identify where they would like to be, and plot intermediate steps along the way.
Thinking bigger: “Ultimate” goal setting
The My Roadmap and Potholes and Detours

• **Purpose:** Potholes and Detours helps clients think through obstacles (potholes) that might get in the way of achieving their goals and how they will overcome those obstacles.
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
A Word from the Counties
Scaling CalWORKs 2.0
Placer County

• First road test county
• Staff training for piloting started in April 2017
• Road test concluded September 2017
• Placer initiated planning for scale up
• Placer launched CalWORKs 2.0 county wide November 2017
What’s Next
## Structured, Supported Implementation

### CalWORKs 2.0 Timeline

#### REMAINING IN 2017

**November**
- County Self-Assessment
- Implementation Survey

**December**
- December 6
  - Training Academy Presentation
- December 7
  - In-Person Board Retreat
  - (San Francisco, CA)

#### 2018

**January**
- Webinar Training Support

**February**
- Implementation Support (Technical Assistance)

**March**
- Implementation Support (Technical Assistance)

**April**
- Implementation Support (Technical Assistance)

**May**
- Exact Date in April / May TBD
  - In-Person County Forum

**July**
- Implementation Support (Technical Assistance)

**August**
- Implementation Support (Technical Assistance)

**September**
- Implementation Support (Technical Assistance)
Suggested County Implementation Team

Core Leadership Team
- CalWORKs Culture Visionary: Manager or Director
- Lead Day-to-Day Project Manager
- Trainer

Expanded Team
- Planning
- Scaling
- Evaluation
For More Information

• Natasha Nicolai, Project Director
  – Nnicolai@mathematica-mpr.com

• Noelle Simmons, Project Officer
  – Noelle.Simmons@sfgov.org