

ACCELERATING TO IMPLEMENTATION OF CALWORKS

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“Leaders and followers prod *each other* toward their shared goal.”

Garry Wills

been forged in both the public and private sectors in order to bridge the many support services that will make self-sufficiency possible. Planning activities have consumed the daily activities of administrators for many months.

INTRODUCTION

The success of Welfare to Work activities will depend in large part on the successful integration and implementation of employment activities throughout the organization. Emphasis on employment, job retention, and staying off welfare requires a major culture shift for line staff accustomed to administering rule driven categorical aid programs. This case study examines the opportunities and challenges of customizing an internal system of segregated employment and benefit services in order to successfully move customers to employment.

“All things that resist change are changed by that resistance in ways undesired and undesirable.”

Garry Wills

URGENCY

There is no time to waste — the state clock will be ticking on time limits before the ink is dry on individual Welfare to Work plans. Many of the procedures and details are still being worked out but in the meantime, implementation of CalWORKs is already upon us. In the previous regime administrators would routinely provide line staff with written instructions and the expectation was that staff would administer these changes timely and accurately. Welfare Reform is not about doing “business as usual.” It is not about accuracy rates nor meant to be about determining eligibility and routinized processing of monthly benefit payments. It is about a dramatic shift in agency focus; employment instead of entitlements. Customers instead of clients. It is about relationships and empowering others and building self-esteem. It is about providing access to safe, reliable and affordable child care and reliable transportation. It is about ensuring that children are safe, immunized and attending school. It is about diversion and prevention; staying

BACKGROUND

As of January 1998, all California social service agencies received Board of Supervisors sign-off on their local CalWORKs Plan and each plan has been certified by the state. While all 58 plans had to meet certain federal welfare reform mandates, each is uniquely designed as a community-wide system to strengthen access to resources that parents need in order to lead self-sufficient lives.

This has not been a time of rest for the leadership of social service agencies. Like never before, Directors and others, have spent countless hours out in their communities strengthening existing community relationships. New partnerships have

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off welfare by obtaining and retaining jobs. It is about responsibility and self-sufficiency. Welfare Reform requires that the culture of social service agencies change if parents are to succeed in achieving sustainable self-sufficiency.

During the past thirty years social service agencies throughout California have reorganized their internal operations in order to provide very specific kinds of service delivery, ie., Income Maintenance, Children and Adult Protective Services, and later Employment Services. A resulting consequence of segregating services is the failure to share pertinent information with one other when services overlap into other program areas. A huge challenge for social service agencies is the restructuring of internal operations so that communication and sharing of customer information occurs regularly. In some arenas I am hearing that eligibility workers, Income Maintenance, per se, cannot make the transition to providing skilled customer employment services. It is troubling to hear suggestions from others that department's ought to cull out the line staff with effective interpersonal skills and transition them to doing employment services. As for the remaining workers, one of the recommendation's I have heard is to refer them to positions in other county agencies, such as the Assessor or Recorder's office. Yet, many administrators have responded to too many concerns from dissatisfied customers. Lack of responsiveness or rudeness of staff is too often the recurring issue. We must invest in training staff.

The complexity and morass of paperwork required in the administration of categorical programs is daunting. Automation has not been able to keep up with the massive tracking, number of program changes and reporting requirements. The number of "designer" Medi-Cal programs are increasing, requiring cumbersome eligibility determinations,

applying previous regulations in some cases and new regulations in others. It is extremely difficult to shift focus to employment activities when eligibility simplification is not part of the CalWORKs package, and yet the shift in employee focus is essential.

INNOVATIVE STEPS TOWARDS INTEGRATION

Santa Clara County has taken some very innovative steps toward integration of CalWORKs benefits and employment services. An important step was the creation of customer friendly lobbies in the Income Maintenance offices that have an employment and community resource focus. Each district office was allocated \$300 to transform their lobbies and the freedom to use it how they thought best. Building on the new lobby image led to the evolution of other changes, including:

- The creation of customer service technician (CST) positions. These employees staff the information booths and reception areas in district offices and provide front-end prescreening services to customers. It was obvious from their manner that the Customer Service Technicians take pride in creating a helpful and friendly environment. They also keep the posted Employment Connection job leads up-to-date.
- Current and well-maintained Employment Connection bulletin board job leads in each of the district offices. In the five district offices I visited bulletin boards were replete with information on a myriad of resources and job opportunities and information was orderly and neat. Most customers were not seated, they were moving about the lobby, checking out the resource information on the bulletin boards.

- Customers have lobby access to Information Cards they complete if interested in training, child care, employment or transportation. They do not have to wait to see their eligibility worker if they make an inquiry. These inquiries are responded to quickly by an eligibility or clerical person who has volunteered for a rotating 4 hour assignment to respond to Information Request Cards. If the request is about a particular job, the employee has the customer complete a survey of skills and abilities and a referral is made to Employment Connection. Service does not stop here, they will walk the customer to the Employment Connection Office or call an employment services worker to have them greet the customer. This is truly customer service. It says a lot about the value placed on linking the customer with employment activity. Also, there has been no problem recruiting volunteers for this assignment. Staff have expressed interest in a new opportunity to interact with customers differently.
- This was a delight to behold — The Employment Connection offices were busier than the Income Maintenance offices. Lots of scheduled job club activity and many Drop-ins.
- A 24-hour, 7 day per week JobKeeper Retention Hotline.
- The pride of the staff at the Employment Connection was effervescent. Staff believe that they have garnered the respect of the employment community as a viable source for qualified job candidates. They see themselves as leaders in organizing partnerships in the public and private sector. Competition for highest number of job placements is clearly not what drives the Employment Connection. They are very willing to

share their pool of job ready candidates with other employment services in order to make the right “fit” with employer needs and employee skills.

- Creation of specialized workers who oversee discontinued CalWORKs customers receiving transitional medical. Instead of banking these “closed cases,” they attempt to maintain regular contact with the customers in order to assess possible job retention issues.
- Colocation consisting of specialists in eligibility, employment services, and social work to serve as an Assessment/Case Management Team. Other colocated services include Family Support with plans to include Employment Development staff. This is a pilot in the Gilroy area and is not yet fully operational.

Organizational restructuring is ongoing. At this time eligibility workers manage all categorical programs. However, eligibility workers manage either new applications or active customers, not both. The department is currently evaluating the pros and cons of creating specialized CalWORKs only case-loads and some preliminary planning has taken place.

A QUICK LOOK BEHIND THE SCENES

When asked, employees were quick to inform me that they had been “change trained to death.” The staff I spoke with feel they are prepared for changes and ready to implement Welfare Reform. It was recommended that Monterey County consider planning change training closer to implementation of actual changes in order to minimize staff anxiety.

Employees performing employment services and

benefit determinations are represented by different labor bargaining units. Integration of services is a classification and membership issue for labor and management. Colocation and assessment/case management teams have been two methods of bringing service delivery together while issues of classification and representation are being discussed.

Representatives from community groups are very actively engaged with the Santa Clara County Social Services Agency in the redesign and implementation of service delivery in their areas.

Pilots are encouraged as a way to test innovative changes in service delivery.

RECOMMENDATIONS

The importance of friendly and responsive customer service and staff training cannot be overemphasized. Training is essential so that staff can be successful in their changing relationship with customers in achieving the outcomes of CalWORKs. Monterey County is already underway with culture change training for employees.

Next steps need to include:

- The development of a mechanism for obtaining routine customer feedback. Development of a measurement and evaluation process that could be linked to CalWORKs outcomes. Employees and customers could come together in a problem solving environment to work on issues. This could serve to evaluate additional training needs.
- Step up efforts to transform lobbies so they are customer friendly with an employment and community resource focus. Encourage the participation of district office staff in lobby redesign.

- Encourage innovative pilot projects that promote integration of specialties in eligibility, employment services, and case management.
- Retention services that includes regular follow-up with customers receiving transitional Medi-Cal.
- Support eligibility simplification legislation that does not comprise the integrity of casework.

IMPLICATIONS FOR MONTEREY COUNTY

Failure to provide friendly customer service will diminish the essential relationship between employee and customer. Status quo will be maintained and failure to meet employment objectives will be the predictable outcome. Training staff in culture change and customer service will promote staff development, build morale, promote relationships of mutual respect of others, and lead to successes in transitioning parents to work.

Transformation of lobbies is underway. However, we have not discussed posting job openings in district offices or an upfront process for customers to request job information while in the lobbies. The Santa Clara model is customer friendly, quick and simplified, and provides for immediate access to the Employment Connection. Benefits and Employment Services could work together to bring this into fruition in Monterey County. It is such a significant but simple process of connecting customers to employment services. This truly sends a clear and supportive message to customers that coming into the welfare office is about getting work. And the wonderful feature is that customers are the self-initiators of this process. Powerful.

It is a massive undertaking to overhaul and over-

haul systems. Pilots allow for small scale overhaul of systems and an opportunity to thoroughly evaluate the magnitude of system changes without jeopardizing entire operations. It provides a “safe” way to fine tune glitches and provides new opportunities and challenges for staff who are invested in the success of the pilot.

Regular follow-up on transitional Medi-Cal cases accomplishes at least three things: 1) provides the ability of staff to intervene and provide referral services if parents are experiencing personal difficulties, making it difficult to retain their job. 2) Eligibility Workers gain experience and expertise outside traditional rule-driven programs. 3) Higher probability that mandated employment outcomes will be met.

Support of eligibility simplification that does not compromise the integrity of cases will provide additional resources for case management.

CONCLUSION

The emphasis of Welfare Reform is on work requirements and time limits. The importance of developing an infrastructure that supports employment efforts of parents and promotes integration of benefit and employment activities is essential to achieving expected outcomes. The success of Welfare to Work activities is about parents obtaining and retaining jobs, accessing reliable and affordable child care, securing reliable transportation, and ensuring that children are safe, immunized and attending school. Implementation of CalWORKs provides opportunities to collaborate with external and internal partners in new ways in order to divert or transition parents to work. It provides an opportunity to create an environment that is customer friendly and one in which relationships

are based on mutual respect. This is an opportunity to “experiment” with pilot programs and to diversify services to meet the needs of communities and working parents. It is a growth opportunity for staff to gain new skills in employment activities, collaboration, case management, assessment, and information and referral. It is an opportunity to contribute significantly to employment outcomes and sustained self-sufficiency of families.