
SERVICE INTEGRATION

INTEGRATED SERVICES IN SONOMA COUNTY: IMPLICATIONS FOR CONTRA COSTA AND MONTEREY COUNTIES

Anne Herendeen and Lori Larks*

EXECUTIVE SUMMARY

Many counties have taken advantage of the opportunity created by Welfare Reform to redesign their service delivery systems to be more client/customer-centered, to be focused on empowering families toward self-sufficiency, and to maximize funding options. Many began to collaborate, coordinate, and fund services in new ways. A number of counties have implemented “crossover” systems between child welfare and CalWORKs and some have integrated services with other public and /or private human services agencies.

The Sonoma County Human Services Department (Department) has engaged in a process to integrate and enhance services in all areas of the department. Lori’s initial interest in this case study was operational (to look at what program changes and systems have been put in place to integrate services to families), while Anne’s was to explore the staff development implications. What evolved was an integrated project, which we hope will embody the vision and values that we saw demonstrated in Sonoma County.

BACKGROUND

The vision for an integrated services team began with an executive team which met off-site 2 years ago. It grew from the desire of executive management to create a systemic approach to insure the highest quality of services to families. There was a strong divisional identification, yet there was not a similar departmental identity. The executive team

agreed to establish an integrated services team, made up of line staff, supervisors and managers which would represent every division in the Department. The division director for economic assistance served as the executive team liaison but did not chair the committee.

THE INTEGRATED SERVICES TEAM

The integrated services team began meeting in May 2000 and continued to meet monthly through the summer and fall. They were assisted in their work by a facilitator, clerical support, and the director of economic assistance. They identified three goals with accompanying objectives and strategies. The goals are as follows:

- Educate managers about cross-divisional and cross-departmental services/funding for families with complex needs
- Educate first level supervisors and line staff about available services in other divisions and departments
- Develop a process that facilitates communication regarding and identification of the full range of available services for clients and families.

INTEGRATION OF SERVICES

Sonoma County is painting a picture of integrated services with a broad-brush stroke. It is looking at how “benefits” can be more closely integrated with the “service” programs, and how programs that

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share common clients can streamline their functions to enhance services, eliminate duplication of work, and be more cost-effective. Examples of services integration include co-location of division staff within the department (i.e., ILP staff at Job Link sites, child welfare worker at Sonoma-WORKS), and location of Family, Youth and Children's staff in elementary schools.

COMMUNICATION BETWEEN DIVISIONS AND ACROSS FUNCTIONS

Sonoma County has developed a number of strategies to enhance communication. There are plans for consolidating Santa Rosa's operations into a "big building" which is still several years away. The integrated services team has been asked to take part in planning the building. Technology plays a vital role as does cross-divisional education and awareness. A key strategy is a new employee orientation and on-going staff trainings that increase employee knowledge of other divisions within the agency.

IMPLICATIONS FOR MONTEREY COUNTY

The following recommendations are being submitted for consideration to the Interim director and executive team:

- Consider a facilitated process similar to that utilized by Sonoma County to map the current "as is" service delivery system. This could serve as a foundation to explore options and opportunities for collaboration, integration, and co-location within the department.
- Staff Development and Training: Revise the New Employee Orientation (NEO) to provide an overview of the entire department. Whenever possible, open trainings to staff from other divisions in increase knowledge and awareness.

- Maximize opportunities for inter-division committee work by routinely and consistently asking the question, "*Who else is impacted or has an interest in this issue?*"
- Aggressively pursue a plan to establish an intranet within the Department that makes information and communication more readily available to all employees.
- Consider co-location of staff across divisional lines to enhance services to individuals and families and improve coordination of services.
- Establish a guiding principle that embodies the question: *How can my division help your client(s) and customer(s)?* Make practice and policy decisions only after this question has been asked and answered.

IMPLICATIONS FOR CONTRA COSTA COUNTY

We recommend that Contra Costa County consider the following:

- Consider revising the new employee orientation based on the Sonoma County model and include an orientation to the S.I.T. (Service Integration Team) sites.
- Consider establishing our own countywide integrated services committee or task force as an expansion of the "crossover committee" that is currently operational in Central County.
- Consider the co-location of child welfare staff at key school sites, such as Verde School (North Richmond), Nystrom School (Richmond), and an East County elementary school as well. Consider the participation of CBOs in offering family preservation support services at the school sites, and the development of a referral tracking system.

- Consider the co-location of a child welfare worker within the CalWORKs units in the West County offices, specifically the Richmond office.
- Establish an operational link between ILP, CalWORKs, and the one-stop centers. These staff could potentially end up working with many of these youth.

CONCLUSION

We have learned a great deal from our time spent in Sonoma County. Our social service systems have developed expertise, programs and departments to address many complex issues. We as service providers, clinicians, and case managers are evolving into a highly integrated system for addressing the families that we share. The challenge is to work together cooperatively in the best interest of our clients/participants. If we could share just one thing that we saw in Sonoma County, it is their spirit of cooperation. If we can encourage that, and help to re-energize and motivate staff about how to make a difference, then we believe we truly can be of service to our communities.

INTEGRATED SERVICES IN SONOMA COUNTY: IMPLICATIONS FOR CONTRA COSTA AND MONTEREY COUNTIES

Anne Herendeen and Lori Larks

INTRODUCTION

With Welfare Reform came an opportunity and a mandate to “do things differently”. Many counties have taken this opportunity to redesign their service delivery systems to be more holistic and client/customer-centered, to be focused on empowering families toward self-sufficiency, and to maximize funding options to support and enhance these goals. Human services and social services agencies began to look for innovative and comprehensive ways to collaborate and coordinate their efforts and fund services. A number of counties have implemented “crossover” systems between child welfare and CalWORKs and some have integrated services with other public and/or private human services agencies.

The Sonoma County Human Services Department (Department) has engaged in a process to integrate and enhance services in all areas of the department. Lori’s initial interest in this case study was operational (to look at what program changes and systems have been put in place to integrate services to families), while Anne’s was to explore the staff development implications. What evolved was an integrated project, which we hope will embody the vision and values that we saw demonstrated in Sonoma County.

BACKGROUND

In July 1994, four previously autonomous departments within the County of Sonoma were merged into a single human services department. The Area Agency on Aging (AAA), Private Industry Council

(PIC), and Veterans Services joined the larger Department of Social Services, with the social services director assuming leadership of the new organization. The former PIC director became the first division director of the merged Employment and Training Division, and the former AAA director became division director of the Adult & Aging Division, which also included Veterans Services. The current agency director arrived 2 years later, in July 1996, and Welfare Reform planning began shortly afterward.

The vision for an integrated services team began with an executive team which met off-site 2 years ago. While there had been much program growth and expansion and some successful cross-divisional pilots, there was a strong desire by executive management to create a systemic approach to insure the highest quality of services to families. There was consensus that there was far more coordination with external partners (other county agencies and community based organizations) than was evident within the organization. There was a strong divisional identification, yet there was not a similar departmental identity. With a vision of enhancing cross-divisional education and awareness, and strengthening the integration of services to the entire family, the executive team agreed to establish an integrated services team, made up of line staff, supervisors and managers which would represent every division in the Department. The division director for economic assistance served as the executive team liaison but did not chair the committee. The integrated services team was charged with exploring possibilities, making recommendations, and submitting a work plan. More recently, the integrated

services team has been asked to take on additional responsibilities as part of implementation. This case study reviews the efforts of Sonoma County in integrating its interdepartmental services and improving intradepartmental identity. After a description of the challenges and opportunities posed by the integration, the authors present the implications and their recommendations for Monterey and Contra Costa Counties.

THE INTEGRATED SERVICES TEAM

The integrated services team began meeting in May 2000 and continued to meet monthly through the summer and fall. They were assisted in their work by a facilitator from the Center for Human Services Training and Development (UC Davis Extension), an administrative assistant who provided clerical support, and the director of economic assistance. The initial meetings were spent sharing what each division did and identifying which areas of the department were not represented. As a result of this process, system support representation was added to the committee. Team members describe their efforts as “a growth process that was rocky at first”. Most came to the first meeting wanting to be told “what to do”. By the second meeting, they had developed a clearer understanding of the committee’s purpose but were still unsure how to proceed. Constructing an internal “as is” service delivery flow chart, using post-it notes and a ten-foot sheet of newsprint, the team began to map out their systems. This was a critical juncture, helping committee members start connections, overlaps and opportunities would lead to the next phases of brainstorming the ideal system, setting goals and timelines to move towards integration.

The integrated services team identified three goals with accompanying objectives. The goals are as follows:

- Educate managers about cross-divisional and cross-departmental services /funding for families with complex needs.
- Educate first level supervisors and line staff about available services in other divisions and departments.
- Develop a process that facilitates communication regarding identification of the full range of available services for clients and families.

Recommended strategies to meet each of these goals were developed and presented to the director in September, 2000 and departmental managers in November, 2000. (Attachment 1). The team continues to meet and to move into an implementation phase, yet throughout the department a number of integrated services efforts are already visible or planned. We explore a few of these.

INTEGRATION OF SERVICES

While many counties are looking at integrating the CalWORKs and Child Welfare Services Programs, Sonoma County is painting a picture of integrated services with a broad-brush stroke. Sonoma is looking at how “benefits” programs (Medi-Cal, food stamps, cashaid) can be more closely integrated with the “service” programs (IHSS, Adult and Children’s Services, etc.). In addition, Sonoma County is examining how all the programs that share common clients can streamline their functions to enhance services, eliminate duplication of work, and be more cost-effective.

The Human Service Department was forward thinking in assigning the task of liaison between the executive team and the integrated services team to the director over economic assistance. With the upcoming implementation of CalWIN (a system that promises a technological method of identifying eli-

gibility for multiple programs), having the director of economic assistance assigned to the integrated services committee is key. The integrated services team could potentially play a critical role in the rollout of CalWIN in Sonoma County.

EXAMPLES OF SERVICE INTEGRATION

1. Co-Location of Division Staff within the Department

One of the first examples of successful co-location of staff from different programs was the placement of a Medi-Cal worker in the SonomaWORKS program. This worker reviews cases that have been discontinued from SonomaWORKS for continued Medi-Cal and food stamp eligibility. Managers reported that, although initially there was resistance from the SonomaWORKS staff to having their case files reviewed by another worker, when they began to see the benefits (e.g. when Medi-Cal determination was made quickly), resistance melted.

Similarly, a Medi-Cal/Food-Stamps worker is being co-located in the In-Home Supportive Services unit to assist workers in providing outreach and determining eligibility.

Though not yet implemented, the Family, Youth and Children's Division plans to locate the Independent Living Program staff at the JobLink (one-stop) sites. The youth can meet their worker at the one-stop center, have access to the computer labs, Internet, and other resources for education and employment. The director of Family, Youth and Children's had received reports from staff that the youth were intimidated by going to the JobLink; however, she felt that if the staff were co-located at the JobLink, the experience would not be as intimidating. This

idea quickly gained acceptance with staff and they are excited about this new "link" for their clients.

Family, Youth and Children's also intends to co-locate a child welfare worker in SonomaWORKS to expedite family stabilization. As a resource person with a small caseload, this worker can assist SonomaWORKS staff in early identification of potential child welfare cases, offer consultation to staff, and provide services to families. By placing the child welfare worker in SonomaWORKS the eligibility worker and employment specialist have been able to see more families and to see them more frequently thus increasing the possibility of prevention. Moreover, when services are needed by a SonomaWORKS family, the child welfare worker can determine if the services can be paid through CalWORKs funding, which has more resources available for transportation, substance abuse treatment, child-care as well as other services than child welfare.

We did look at one "externally placed" worker (a child welfare worker located in the elementary schools). Due to the success of this move, and its potential for implementation in other counties, it bears mention.

2. Location of FYC Staff in the Elementary Schools

Family, Youth and Children's Services have co-located a child welfare worker in some elementary schools across the county. How the workers operate in one school may differ from how they operate in another school depending upon how the resource staff (nurses, school psychologist/counselor, etc.) are organized and utilized at the school site.

For instance, at one school in Healdsburg, the child welfare worker coordinates closely with a contract outreach worker who provides supportive services to children and families. The contract worker is located in the nurse's office at the site but also makes home visits and helps identify cases that need child welfare intervention. At another site, this same child welfare worker works closely with the school counselor and makes home visits as well as meets with children and their parents at the school. The staff from both schools were very enthusiastic about working closely with Family, Youth and Children's Services. They reported that worker accessibility was a great asset in interacting with "the system" and in providing prevention services to the families. Traditionally, schools and school boards often have been frustrated that child welfare agencies are not able to intervene with chronically truant children. Often the schools also view chronic truancy as symptomatic of other serious issues, such as parental substance abuse, mental illness, and child abuse. Unless there is a report of suspected child abuse or neglect, child welfare agencies rarely have the resources to investigate "weaker" referrals of "educational neglect" which is not, by itself, petitionable in California. Since many referrals are generated from the schools, having a child welfare worker on-site continues to be endorsed by both the school district and the Human Services Department. Having the child welfare worker at the school site also helps school personnel when they need to make a suspected child abuse report. Sonoma County school counselors, other school staff and administrators with whom we spoke all commented that they have learned a lot more about how to interface effectively with the child welfare system since having the worker at the school site.

COMMUNICATION BETWEEN DIVISIONS AND ACROSS FUNCTIONS

While co-location of staff can resolve some communication issues and improve the knowledge base of the co-located staff, in a geographically large county with many separate offices, other approaches need to be considered and developed.

1. The "Big Building"

For approximately 10 years, the Human Services Department has had plans to build a "Big Building" to bring together staff who are currently in nine sites throughout the county. By bringing staff together, the Human Services Department hopes to make it easier for staff across programs to communicate and for clients to access services. A site has been identified, and environmental and feasibility studies are underway. It appears occupancy of the new building could occur as early as 2003. The integrated services team has been asked by the executive team to take part in planning the new building. Committee members from all levels and divisions are going to participate in planning the design of the building and workstations and who is located where. The leadership in Sonoma is demonstrating an openness for staff at all levels to participate in work that is often relegated to the most senior staff. There is an attitude of mutual respect and cooperation that was evident throughout the County and apparent in the staff we interviewed.

The Human Service Department offices in Sonoma County are spread out over many miles, mostly located along the Highway 101 corridor. With occupancy of the "Big Building" still a few years away, it became apparent to the integrated services team that access to technological tools was key to their goals.

2. Increased Use of Technology

The use of technology quickly emerged a critical tool to support and expand integrated services. The following technological resources were identified as critical components to cross-divisional awareness and communication: a personal computer at every workstation, an agency intranet, Internet access, and email. The Human Services Department has an intranet that cannot reach its full potential as long as there are staff who do not have access.

3. Facilitating Cross-Divisional Education and Awareness

Several major staff development efforts are underway to educate staff about the department. These begin at new employee orientation, where one of the basic elements is an overview of the department. Each of the five divisions is highlighted and the services available are briefly explained, with a recurring theme of "Who might use this service?" The overview concludes with an interactive exercise that gives participants the opportunity to match individuals and families with the appropriate division for services. This new orientation procedure has been quite successful, resulting in new staff identity with the entire department, rather than solely the division to which they are assigned. In some situations, they have been able to see how the services of the department might benefit their own family or friends. Staff identify with a multi-faceted, comprehensive human services agency, rather than the "welfare department".

After revising the orientation procedures, there was a recognition that experienced staff could also benefit from the overview of the department and that cross divisional education was a critical foundation in integrating services. For this reason, the over-

view was taken "on the road" to the 9 district offices. The presentation was modified to include a more complex family situation in the referral exercise. The training is seen as successful and is planned to be offered yearly. This also provides an opportunity to update staff about program changes and/or expansions on a scheduled basis.

CURRENT AND FUTURE CHALLENGES AND OPPORTUNITIES

1. CalWIN

The implementation of CalWIN could present many challenges for Sonoma as well as other counties who have intake staff who are now trained in specific programs. As CalWIN promises to simplify the eligibility process for all of the benefits and employment programs, the Human Services Department may wish to re-design their intake process, cross-train staff in other programs, and create specialized staff positions and/or a generic intake staff classification.

2. Personnel Classification

As a result of PIC integration, Welfare Reform, and the creation of SonomaWORKS, a re-classification study was completed after a long, arduous and somewhat contentious process with the union. Staff from two different classification systems, who did similar work but were paid differently, were suddenly in the same department. It is to the department's credit that a commitment by staff and management was maintained through this process to provide a high level of service to clients and customers. It is likely that as service integration evolves and as job responsibilities, authorities, and required skill sets change, there will continue to be classification challenges that will need to be addressed.

3. Budget Constraints

This year's state budget is being prepared, with directions from the governor, to show a new budget with no increases and a second "drill-down" budget with reductions. This, coupled with the increased resources allocated to energy costs, means that plans for program enhancement and expansion will likely be challenged.

4. Limitation of Resources

Overwhelmingly, directors, managers, and staff reflected on one of biggest challenges in the county right now: affordable housing. This impacts both clients and the ability to attract new employees to Sonoma County. The Health and Human Services Committee (comprised of executive staff from Human Services Department, Health Services, Probation, County Administrator's office, DA Family Support, Office of Commissions and Community Development) all agree that this is a critical issue for clients, especially those nearing the end of their SonomaWORKS eligibility. This committee, which is both a "think tank" and informational body, meets on a monthly basis to address critical issues facing the County.

Throughout our stay, we saw an attitude of cooperation that was fostered at many levels in the organization and within the collaborative community. There is a commitment to the identification and resolution of problems in an integrated coordinated fashion. There is a spirit of trust throughout the organization that nurtures creativity and innovation. The committee has built, and are continuing to revise, their human services infrastructure to maximize services and resources. They also have recently completed a "values" statement, motto, and a logo that will serve as a touchstone and anchor

(Attachment 2). As Sonoma County continues to implement its plan for service integration, no doubt there will be many opportunities and challenges. They are fortunate that they have created an environment in which to proactively examine these challenges.

IMPLICATIONS FOR MONTEREY COUNTY

Sonoma County Human Services Department is similar in size to the Monterey County Department of Social Services. The demographics, client base and issues of the two counties are similar in many ways, which makes them ideal as comparison counties.

Both Monterey and Sonoma counties are committed to working within a values-driven environment and framework. They are both committed to providing quality services to the individuals and families in their respective communities. Through a process that started with visionary leadership and a willingness by that leadership to empower staff to make the vision and plan a reality, Sonoma County Human Services has created a number of specific strategies and practices that should be considered by Monterey County Department of Social Services. The following recommendations are being submitted for consideration to the interim director and executive team:

- Consider a facilitated process similar to that utilized by Sonoma County to map the current "as is" service delivery system. This could serve as a foundation to explore options and opportunities for collaboration, integration, and co-location within the department. Encourage participation by staff from all divisions, district offices, and levels within the organization.

IMPLEMENTATION OPTIONS AND ISSUES: *Facilitation can be arranged through the UC Davis con-*

tract for FY 01/02 without additional cost. If MCDSS decides to initiate this process, it would also be critical to provide clerical support and a liaison with the executive team. Of larger concern is the amount of staff time that would be required, given the other initiatives (i.e., Pacific Institute, Family Development Credential) to which the department is committed. A time-limited, three to four month project during the fall (before winter workload) would be most likely to be successful.

- Staff Development and Training
 - Revise the New Employee Orientation (NEO) to provide an overview of the entire department and create an exercise to assist new staff in reinforcing and applying the information about the services throughout the department.
 - Whenever possible, open trainings to staff from other divisions to increase knowledge and awareness.
- IMPLEMENTATION OPTIONS AND ISSUES: *These initiatives can be incorporated into the Annual Training Plan currently being developed. The revisions to the NEO curriculum could be completed by the time of the next orientation; however, it would be critical to look at what parts of the current curriculum could be replaced and/or determine that additional time is needed. There is a current NEO committee that could take this on. We are currently looking at the training calendar and how information about trainings is distributed. Attention will be given to how we can best market available trainings.*
- Maximize opportunities for inter-divisional committee work. Sonoma County has instituted an integrated grant-writing team and plans an integrated legislative analysis team. Monterey County has previously formed similar committees to work on issues such as contracts man-

agement and could benefit from routinely and consistently asking the question, "Who else is impacted or has an interest in this issue?" Program committees should routinely consider whether inclusion of other programs and/or support functions (clerical, system support, staff development and personnel) would enhance their efforts.

- Aggressively pursue a plan to establish an intranet within the department that makes information and communication more readily available to all employees. IMPLEMENTATION ISSUES: *The system support section of Administrative Services has already done considerable research into this issue and there are significant barriers especially with the CWS/CMS and ISAWS systems. There are also obviously significant costs but also significant benefits. This issue bears discussion in the department's strategic planning process.*
- Consider co-location of staff across divisional lines when doing so will enhance services to individuals and families and improve coordination of services. Examples to consider include collocating the AFDC-FC benefits staff within Family and Children's Services, co-locating Independent Living Skills within the One Stop Career Center, and expanding Family Conferencing services to other divisions, most specifically the Office of Aging and Community Services. IMPLEMENTATION ISSUES: *With the recent relocations resulting in additional space for Family and Children's Services at the Quadrangle, it would be an ideal time to look at including the foster care eligibility workers into the FCS workspace. ISAWS wiring currently exists in the newly acquired space, so additional costs would be minimal. It would be important to have clarity of supervision responsibilities from the beginning. Other co-location opportunities*

would need further exploration. We have learned from other out-station experience that establishing and maintaining communication links is of critical importance both to the program and within the working location. This includes attention to technology needs (in many cases, out-stationed workers may need access to more than one system) unit identification, and clarity of decision-making and supervisory responsibilities. Attention to these details can minimize or eliminate frustrations experienced by the out-stationed staff, his or her program supervisor and those that they work with on a day-to-day basis.

- Establish a guiding principle that embodies the question: *How can my division help your client(s) and customer(s)?* Make practice and policy decisions only after this question has been asked and answered.

IMPLICATIONS FOR CONTRA COSTA COUNTY

Contra Costa County Employment and Human Services is a much larger county department than Sonoma County Human Services Department in terms of clients served and staff employed. However, both of the counties cover broad geographic areas that serve diverse populations. Both Contra Costa and Sonoma County are committed to excellence in service provision and program design and implementation. Both counties are also committed to continued program improvement and innovation that is cost effective and relevant to the community.

As we recommend that Monterey County consider integrating many aspects of the Sonoma County model, we also recommend that Contra Costa County consider the following:

- As Staff Development is expanding and evolving, consider revising the new employee orientation based on the Sonoma County model. That is, use an exercise that helps teach new employees the focus of each of the service/benefit programs. The exercise Sonoma County developed uses an example of an extended family with multiple system needs who face complex challenges. Staff then navigate through the exercise to determine which services this family could use and what programs to which they might be referred. This has proven to an effective way of teaching new employees about the different programs and their relationship to each other. New employee training should also include an orientation to the S.I.T. (Service Integration Team) sites. Few staff understand the operation of the S.I.T. and how case/service decisions are made (the multi-disciplinary team process). This part of Sonoma's orientation has fostered an appreciation for the work being done in other bureaus/divisions. It also fosters an appreciation of the complex challenges an individual or family faces when interacting with the agency.
- Consider establishing a county-wide integrated services committee or task force as an expansion of the "crossover" committee that is currently operating in Central County. IMPLEMENTATION CONSIDERATIONS:
 1. *In establishing our own integrated services task force, invite key staff from all bureaus and across all classifications to achieve balanced representation of the department.*
 2. *Charge the committee to ask the following questions:*
 - a. *How can my bureau assist your client?*
 - b. *How can services in the district offices be improved and streamlined?*

- c. *In considering anticipated program and system changes, what are the impacts to clients, staff, and operations across the department?*
 - d. *What can we do now to plan for these changes and insure that services integration planning addresses these changes?*
3. *Include union participation in the task force.*
- Consider the co-location of child welfare staff at key school sites. IMPLEMENTATION STRATEGIES:
 1. *Two candidate schools might be Verde School in North Richmond and Nystrom School in Richmond (both elementary schools). Consider location of a child welfare worker at an East County elementary school as well.*
 2. *Consider the participation of CBOs in offering family preservation support services at the school sites to continue to work with families who have been identified as needing early intervention and prevention services. The overarching goal is helping families build support systems and address issues that could potentially place them in the child welfare system. This strategy is in line with our re-design of child welfare to strengthen front-end services and offer community services to families in need.*
 3. *During the screening process, begin to track the number of referrals that include suspicion of educational neglect. In addition, track the number of families that have received school based services and denote the outcome (whether a CWS case was opened and if so, for how long). This data could be useful in securing future funding.*
 - Consider the co-location of a child welfare worker within the CalWORKs units in the West County offices, specifically the Richmond office. The worker would serve as a resource

for the CalWORKs staff and also carry a case-load of crossover cases. This location is being proposed after interviewing the CalWORKs Division manager who has crossover responsibility.

- Establish an operational link between ILP, CalWORKs, and the one-stop centers. We already have plans to locate ILP in the electrical contractor's building; however, many CalWORKs and one-stop staff do not know much about ILP yet they could potentially end up working with many of these youth.

CONCLUSION

We have learned a great deal from our time in Sonoma County. We realize, after being in the field of social work for a combined 42 years, that we have seen many cycles of organization and re-organization. Though some may think that integrated services is a "going back" to the way it used to be before "separation", we think differently. Much more is known about the cycle of abuse, its relationship to poverty and powerlessness, and the intertwining of substance abuse, cultural and/or immigration factors, and mental illness. Our systems have developed expertise, programs, and departments to address these issues. We as service providers, clinicians, and case managers are evolving into a highly integrated system for addressing the families that we share. The challenge is to work together cooperatively, in the best interest of our clients/participants. If we could share just one thing that we saw in Sonoma County, it is their spirit of cooperation. If we can encourage that, and help to re-energize and motivate staff to make a difference, then we believe we truly can be of service to our communities.

ACKNOWLEDGEMENTS

There are many people to thank for helping to make our internship so informative, enlightening, and memorable.

- To Dianne Edwards, Director of Sonoma County Human Services Department, the Executive Team and staff for welcoming us so warmly and sharing so openly about the process, successes and challenges
- Special thanks to Linda Kalenik and Beckie Henry who provided invaluable assistance, answered our many questions, and found us information and resources whenever we asked
- To our directors, John Cullen and Helen Shaw, and Danna Fabella for allowing us the opportunity to participate in the BASSC Executive Development Program and supporting our integrated project
- To the staff of Sonoma County who spent precious hours and days with us. Special thanks to Elaine Hamlin, Carol Bauer, Jerry Dunn, and Marion Deeds who provided us with a great deal of history, resources, and food for thought
- And finally, to our staff and fellow managers in our home counties who took on extra responsibilities and duties so that we could complete the program. Thanks also to Fran Treas and Deborah Polk who provided valuable feedback in conceptualizing the expansion of service integration in Contra Costa County.

Integrated Services



Draft Recommendations

The Sonoma County Human Services Department values coordinated, integrated services that efficiently and effectively meet the needs of clients and families. Since April 2000, the Integrated Services Team has been meeting to formulate a plan which facilitates cross-divisional education and awareness, and strengthens the integration of services to the entire family.

The team identified three goals that would advance the integrated services concept. We then developed objectives that would help the department meet those goals. From these objectives we have formed several recommendations.

In framing our recommendations we worked under the following assumptions:

- The three goals are equally important and interdependent
- There are cost factors associated with some recommendations which may affect their adoption or the timing of their implementation
- When work groups or task forces are formed, all levels of staff will be represented

The use of information technology as a tool to support and expand integrated services emerged as an issue that stands alone. Information technology can help meet all three of the team's goals by making the following resources available to all staff:

- ❖ PC's at every work station
- ❖ Intranet
- ❖ Internet
- ❖ E-Mail
- ❖ Other appropriate resources

Making the following available will help centralize resources:

- ❖ Central repository of program specific materials (e.g., manuals)
- ❖ Forums on Intranet

The HSD Intranet is an important first step on the path to better integrated services.

GOAL #1

How can managers help line staff to think about integrated services?

GOAL: Educate managers about cross-divisional and cross-departmental services/funding for families with complex needs.

Education and Development of Managers

- ◆ Use quarterly managers' meetings to focus on one specific service/program at a time
 - The presentation could take the form of an overview, like an internal resource meeting, with a focus of "what my program can do for the families you serve," until our focus becomes "our families and our programs."
- ◆ Peer partnerships or job shadowing for managers, across division lines: We recommend that managers be encouraged to partner with a peer in another division, to work on specific projects, as a way to learn the other division's programs.
- ◆ Specific assignments in another division. Examples include:
 - Revising an internal process, such as intake
 - Space utilization
 - Implementing new regulations
 - Helping develop a community outreach strategy
 - Short-term projects similar to the BASSC internship

Leadership Development

- ❖ Designated legislative analysis team that works across division lines (using multi-divisional grant writing team as a model)
- ❖ Continue to encourage and expand participation in the Bay Area Social Services Consortium (BASSC) Executive Development Program

GOAL #2

How do we empower supervisors and line staff to go beyond division lines to provide integrated services?

GOAL: Educate first level supervisors and line staff about available services in other Divisions and Departments.

Topics and Tools for the Resource Committee Meetings

- ❖ Incorporate planned changes in 2001 resource meetings as a vehicle for cross training.
- ❖ Increase in-house advertising of resource meetings by supervisors and managers. Managers and supervisors can focus on how different programs can meet the needs of their division's clients.
- ❖ Post meeting dates, times, and notes on the department Intranet.

Staff Training Options

- ❖ Information sharing and confidentiality training for all staff, using an open model versus a closed model.
- ❖ Place additional focus on integrated services in new employee orientation
 - Solicit staff trainers' input on current orientation, and how a curriculum that communicates the core value of integrated services could be developed.
- ❖ Implement regular integrated services trainings for all employees (one per year)
- ❖ Each Division is allocated a set number of UC Davis training days. Many of these sessions are program-specific, but some are not. When possible, look for opportunities to open division-level training to other staff if appropriate. This is not necessarily limited to UC Davis training.
- ❖ Develop cross-divisional education for supervisors and lead workers, including all divisions' support staff. Focus on structured teambuilding (off-site if possible), leading to long term organizational culture changes that enhance integrated services. One example of this is the FY&C Division's three strategic planning days.

Interdivisional Communication

- ❖ Establish case conferencing across programs (i.e. multi-disciplinary team model). We recommend piloting an MDT case conferencing model with SonomaWORKS and CPS.

- ❖ Develop, designate and identify primary contacts/experts across division lines for all staff. Within each division, each section manager can designate a subject matter expert or contact person for questions about program.
- ❖ Create work groups to address confidentiality and information sharing across divisions (revise release of information forms, procedures, etc.).
- ❖ Co-location of staff – continue to expand (i.e. CPS worker at SonomaWORKS).
- ❖ Develop an exit team to review closed SonomaWORKS cases for eligibility for transportation or child care, to better coordinate post-employment services, like the Medi-Cal worker at SonomaWORKS.

GOAL #3

How do we best inform our community of all the services we provide?

GOAL: Develop a process that facilitates communication and identification of the full range of available services for clients and their families

- ❖ Form a standing community outreach position or committee who will:
 - Educate community about programs (Public Service Announcements, video development, etc.)
 - Act as Public Information Officer/ Media Relations
 - Coordinate department wide Speakers Bureau
 - Assist with departmental efforts in capital campaigns such as VOM
 - Coordinate Service Fairs

Cross-departmental Team Building

- ❖ Begin meetings or training with staff from CAO, Probation, Mental Health, etc. to facilitate and expand the team concept.

Facilitate use of automated eligibility screening tools available at out-stationed sites and community-based organizations:

- SMART
- CALWIN

Travelling Services Fair:

- ❖ Create one designed for staff use
- ❖ Design one for community: Family Fun Night at malls, etc.

Closing Comments

We believe the implementation of these recommendations will be the solid beginning of a plan to bring our department and community together for the purpose of better serving families through integrated services.

The department mission statement and any vision or values statement will address integration and the importance of integrated services. The Executive Team will challenge staff to make the needed culture changes.

Thank you for reviewing our recommendations.



VALUES

Integrity

- Encourage conduct which reflects high ethical standards and maintains public trust
- Foster an environment which supports employee commitment to responsibility and personal accountability

Teamwork

- Respect and support individuals and their roles, recognizing individual beliefs and differences
- Use the combined resources of the Department and the community to make things happen
- Promote and participate in a learning organization

Leadership

- Define goals and communicate them
- Share success and recognize each other's efforts
- Teach people how and trust them to do
- Encourage creative thinking
- Be willing to take risks, anticipate problems and see solutions

Make A Difference

- Shape and strengthen defined outcomes by conducting program evaluations
- Perform at a consistently high level, raising the bar to challenge your limits
- Acquire the skills to succeed
- Leave our clients better off than they were

VISION

Human Services Department . . .
Meeting the needs of our community through accessible and responsive programs.

MOTTO

Empower, Support, Protect