ONLINE PRACTICE GUIDE IMPLEMENTATION
IN CHILDREN AND FAMILY SERVICES

Ylonda Calloway*

EXECUTIVE SUMMARY

INTRODUCTION

Until recently, San Francisco County used paper-driven program handbooks. Policy and procedural updates would be written, reproduced, and issued to staff who would then be instructed to replace old handbook pages with the current updates.

Rapid and persistent changes to welfare policy have made it difficult to manage this method used for providing information to staff. In order to keep up, Program Information Memorandums (PIMS) are issued whenever policy changes need to be immediately dispatched. PIMs are efficient in providing immediate access to new information, so in addition issuing handbook revisions; the PIM is also used as a vehicle for circulating changes to policy and procedures. San Francisco County is now exploring possible solutions for delivering program information in a practical and efficient manner.

FINDINGS

In 2000, Alameda County Social Services received a notice of non-compliance from the California Department of Social Services. They were cited for being in violation of Division 31, the State's child welfare regulations. After analyzing the system in place, Alameda developed a corrective active plan that included developing a system to provide child welfare workers with quick access to up-to-date policy and procedures, and dedicating substantial resources in order to invest into the development of a Child Welfare Practice Guide.

CHALLENGES

When Alameda County decided to establish a web-based, online procedures guide, its IT Department created a website using a computer application which required the IT Department to make all updates to the website.

When there was a change in policy and/or procedures, the Practice Guide staff would e-mail the IT Department in order to send updates. The IT Department had to be told what section, page, paragraph, etc. would need to be changed. The IT Department would then make the updates on the website. Staff members with different priorities were required to interact in order to update the Online Practice Guide. The challenge was to find a way for the content manager to make changes to the Online Practice Guide without having to coordinate with the IT department.

SUCCESSES

In order to more efficiently update its Online Practice Guide, Alameda's IT Department decided to train the Practice Guide staff to use a computer program developed by Macromedia called Contribute. Contribute is a software product that allows non-technical staff to update website content without having to be trained in website manage-

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ment. Although Contribute allows Practice Guide staff members to update the Practice Guide, IT staff is still able to maintain control of the website by limiting access to the structure and design of the website.

IMPLICATIONS/RECOMMENDATIONS

The Online Practice Guide has been proven as a useful tool to provide up to date information in a very efficient and cost effective way. San Francisco Department of Human Services' Handbook staff will need very little training to use the program. Moving from a paper driven process to an online system will provide continuity in the way that staff access program information. It ensures that everyone will be using the same source and eliminates the challenge of getting staff to always use the most current information. Converting to an online manual will also provide substantial savings on reproduction costs. Installation of the Online Program Guide is expected to reduce Alameda's reproduction budget by $100,000 annually.

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Rapid and persistent changes to welfare policy have made it difficult to manage this method for providing information to staff. In order to keep up, Program Information Memorandums (PIMS) are issued whenever policy changes need to be immediately dispatched. PIMs are efficient in providing immediate access to new information, so in addition issuing handbook revisions; the PIM is also used as a vehicle for circulating changes to policy and procedures. San Francisco County is now exploring possible solutions for delivering program information in a practical and efficient manner.

BACKGROUND

Online help systems automate the process of writing policy and procedures by allowing technical writers and content managers to convert paper documentation into an online manual. The online manual is then published on an intranet or internet site where information can be located and referenced quickly by staff.

In September of 2003, I attended a seminar called "Social Services Online". During the seminar there was a presentation from Alameda County Social Services called "Information @ the Speed of Life: The Online Practice Guide". Alameda's presenta-tion of its Online Practice Guide was very impressive. I chose this interagency exchange because I was excited to learn how Alameda County designed and established a website to create, update and publish its policies and procedures.

DEVELOPMENT OF ALAMEDA COUNTY'S CHILDREN AND FAMILY SERVICES MANUAL OF POLICIES AND PROCEDURES

In 2000, Alameda County Social Services received a notice of non-compliance from the California Department of Social Services. They were cited for being in violation of Division 31, the State's child welfare regulations. After analyzing the system in place, Alameda developed a corrective active plan that included developing a system to provide child welfare workers with quick access to up-to-date policy and procedures, and dedicating substantial resources in order to invest into the development of a Child Welfare Practice Guide.

CREATING A PLAN

Pauline Keogh is an Alameda County Family and Children Services Management Analyst, who was hired to develop the Department's Manual of Policies and Procedures. Pauline discovered that she would have to gather and inventory a vast amount of written materials. She requested that program staff submit any and all memos and other documents that were being used to research child welfare policies and procedures. Practice Guide staff cataloged hundreds of documents by subject and date. They discarded obsolete documentation while current policies and procedures were retained

and included as content in the Practice Guide. Alameda decided to use San Diego County's child welfare manual as a template for creating its Practice Guide.

In order to more efficiently organize and disseminate program information, Alameda also decided to establish a website dedicated to housing an Online Practice Guide. The website would house links connecting staff to child welfare regulations; all county letters; step-by-step procedures; forms; and emergency alerts regarding new initiatives.

A work plan was created and divided into phases in order to prioritize tasks and pare down the project into smaller more manageable sections.

Phase One:
- Identify existing reference materials in order to purge outdated or obsolete documents.
- Document current practices
- Identify policies and procedures that need to be written
- Organize the materials into chapters

Phase Two:
- Begin writing the Practice Guide
- Submit for review by program management
- Inventory and catalog forms in order to post online forms within the Online Practice Guide
- Identify and link child welfare related websites to the Online Practice Guide

Phase Three:
- Train staff in use of the Online Practice Guide
- Develop a plan for managing the website
- Plan for future upgrades to the website

CHALLENGES AND LESSONS LEARNED

When Alameda County decided to establish a web-based, online procedures guide, their IT Department created the website using a computer application which required the IT Department to make all updates to the website.

When there was a change to policy and/or procedures, the Practice Guide staff would e-mail the IT Department in order to send updates. The IT Department had to be told what section, page, paragraph, etc. would need to be changed. The IT Department would then make the updates on the website. Staff members with different priorities were required to interact in order to update the Online Practice Guide. The challenge was to find a way for the content manager to make changes to the Online Practice Guide without having to coordinate with the IT department.

OBSTACLES OVERCOME

In order to more efficiently update its Online Practice Guide, Alameda's IT Department decided to train the Practice Guide staff to use a computer program developed by **Macromedia** called **Contribute**. *Contribute* is a software product that allows non-technical staff to update website content without having to be trained in website management. It is user friendly because it is very much like a word processing program and very little training is needed. Contribute also eliminated the need for the IT Department to have to spend time publishing updates to the website. The Contribute software allows Online Practice Guide Staff to provide instant updates to the Online Practice Guide, which ensures that the content is always current.

Although Contribute allows Practice Guide staff to update the Practice Guide, IT staff are still able to maintain control of the website by limiting access to the structure and design of the website.

SUCCESSES

Alameda's Online Practice Guide was launched on February 28, 2002. In the first month there were 541 visits to the website. The website is currently receiving between 1700 and 2700 visits per month. Child welfare workers are encouraged to provide feedback to the Practice Guide content manager. Most of the initial feedback requested that additional information regarding specific procedures be added. Some of the staff was requesting online forms and others gave feedback about some of the procedures.

CHANGE MANAGEMENT

Child welfare staff was asked to purge their reference materials and to consult the Online Practice Guide for program information. Although child welfare staff members are encouraged to print out information that they are researching, paper manuals and program memoranda are no longer issued. Alameda realized substantial savings related to not having to issue hardcopy reproductions of program updates. Installation of the Online Program Guide is expected to reduce Alameda's reproduction costs by $100,000 annually.

IMPLICATIONS FOR SAN FRANCISCO COUNTY

In March 2003, San Francisco County introduced RoboHelp computer software to the department's handbook staff. RoboHelp is a desktop, web-based computer program that allows handbook staff to cre-

ate and update program handbooks. There are some challenges to using RoboHelp. RoboHelp required hours of training. After training, existing program documentation was imported to RoboHelp. The program was then posted on the department's intranet site. Even after receiving extensive training, the handbook writers were still unable to apply the RoboHelp concepts and did not feel proficient in using the program. They will not be able to utilize this program without another course of training.

RECOMMENDATION

The Online Practice Guide has been proven as a useful tool to provide up-to-date information in a very efficient and cost-effective way. Handbook staff will need very little training to use the program. Moving from a paper-driven process to an online system will provide continuity in the way that staff accesses program information. It ensures that everyone will be using the same source and eliminates the challenge of getting staff to always use the most current information.

The advantages of using an online help system are:
- It is easy to update
- It reduces reproduction costs
- It is more accessible to staff
- It is easy to navigate
- It eliminates the filing of handbook updates by staff

The challenges of using online help systems are:
- They may require considerable IT support to make updates to the manual

And
- Staff may be resistant to discarding their paper manuals

During my visit to Alameda County, I was able to observe the content manager updating the website. This process literally took seconds. I navigated around the website and found it user-friendly. The search feature made it very easy to locate specific information. The website design was very professional.

I learned that San Francisco already has the *Contribute* software and the resources to build a website.

My recommendation is to go forward with developing a handbook website. RoboHelp training has already familiarized our handbook staff with online documentation. Some of the lessons learned during my internship in Alameda were:

- Coordinate with the IT Department
- Start small by piloting one handbook—it allows handbook staff to gain some expertise
- Construct a work plan
- Use deadlines
- Divide the project into phases so handbook staff stay focused
- Advise staff to purge old documentation upon implementation of the new system

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