Senate Bill 1041 Implementation Field Monitoring Visit Summary

El Dorado County

Visit Date: January 30, 2014

CALIFORNIA DEPARTMENT OF SOCIAL SERVICES
Welfare to Work Division
Todd R. Bland, Deputy Director

El Dorado County

Senate Bill (SB) 1041 Implementation Field Monitoring Visit Summary

Executive Summary

Purpose of Field Monitoring Visit

The purpose of the Senate Bill (SB) 1041 Implementation Field Monitoring Visit is to obtain information regarding the county's progress in implementing program changes enacted by SB 1041 (Chapter 47, Statutes of 2012).

Scope of Field Monitoring Visit

Specifically, the California Department of Social Services (CDSS) will review how each County Welfare Department (CWD) implemented SB 1041 program changes, including but not limited to:

- New Welfare to Work (WTW) participation requirements;
- WTW 24-Month Time Clock;
- Reengagement of the former short-term young child exempt population (Assembly Bill [AB]
 X4 4 group);
- CWD staff knowledge of SB 1041 changes;
- Training provided to staff in order to implement these changes; and
- Any pertinent data related to these program changes that are available.

Goals of Field Monitoring Visit

The CDSS' goals are to ensure that SB 1041 is being implemented correctly by each CWD, to gather promising practices in regards to implementation, to share these promising practices (when able) amongst all CWDs throughout the state, and to determine whether systematic or program issues relating to the integration of SB 1041 changes into the existing California Work Opportunity and Responsibility to Kids (CalWORKs) and WTW program exist throughout the state. If such issues exist, they will be addressed by the SB 1041 Oversight Workgroup.

County Visit General Information

The one-day field visit was performed in El Dorado County on Thursday, January 30, 2014, at the Health and Human Services Agency Main Campus in Placerville, CA. The field visit team included one manager and three staff members from the CDSS, Welfare-to-Work Division, CalWORKs Employment and Eligibility Branch along with the El Dorado County Health and Human Services Program Manager II, Program Manager, and two additional county staff members. The field visit consisted of a kick-off meeting, close-out meeting, staff interviews, and case management observations with county staff.

Implementation Strategies

El Dorado County prepared for implementing the SB 1041 related program changes by analyzing All County Letters (ACLs) as they were published, attending Mountain Valley regional meetings to discuss changes and implementation strategies, training staff on new changes, and providing direction and guidance for implementation. SB 1041 implementation was introduced to staff on January 9, 2013, at an all staff meeting.

Tools were developed such as a checklist of the new program changes for staff to use in discussions with clients and journal entry templates to ensure staff are covering the information at appropriate times.

Successes

El Dorado County provided thorough training to staff on the SB 1041 related program changes, and the county continues to update staff as new ACLs become available. Information and tools were also shared through emails, clarification/question and answer lists, presentations, case scenarios, flow charts, checklist tools, journal templates, and other handout material.

When providing orientation to clients, the county provided both a comprehensive appraisal and assessment upfront. The county thoroughly explained program changes to clients. Caseworkers were able to utilize the WTW 24-Month Time Clock as a guide for clients to plan their educational goals, and specifically utilized the flexibility of the WTW 24-Month Time Clock to meet vocational education goals.

El Dorado County employs an "open door" communication policy between employment and eligibility workers. Bi-weekly unit meetings are led by supervisors and often incorporate workers from the Workforce Investment Act (WIA) program and Employment Services. Bi-weekly unit meetings are to review current case load status, program implementation changes, and any questions from case workers.

Cases reviewed demonstrated detailed case narration and documentation, including the Statewide Automated Welfare System Consortium-IV (C-IV) journal template used to ensure completion of thorough comprehensive discussions. El Dorado County's use of the Welfare-to-Work Plan Activity Assignment (WTW 2) supports the development of a client's short- and long-term goals by outlining a step-by-step plan including activities the client is to engage in to reach the outlined goals.

El Dorado County has a good relationship with the local community colleges including collaboration to ensure students have the required course materials and tracking of student progress toward educational goals. The availability of vocational education programs and adult basic education in El Dorado County is also a strength.

Key Recommendations

El Dorado County reported delays in the automation of C-IV hindered their ability to ensure that all notices were delivered via automated system and that manual work around were labor intensive and difficult to track. The CDSS suggest that El Dorado County seek out a manual tracking system in the event that automation is delayed in the future. The county should also collaborate with C-IV staff to ensure that the automation to track the Welfare-to-Work 24-Month Time Clock is accurately and efficiently updated within the C-IV consortium and the Welfare Data Tracking Implementation Project (WDTIP) system alike. El Dorado County should communicate any continued automation issues with the C-IV consortium to resolve the situation.

The County should also ensure that clients receive the Welfare-to-Work 24-Month Time Clock Notice (CW 2208) timely as required by ACL 13-12. The county should continue to document all notices in the client case files.

The CDSS also recommends that El Dorado County continue to pay close attention to the data that is submitted through their consortium system to the CDSS such as the CalWORKs WTW Monthly Activity Reports for All (Other) Families and Two Parent Families (WTW 25/25A). These sources are relied upon heavily by the Department so accurate reporting from counties will ensure a better understanding of how SB 1041 changes have affected clients in the CalWORKs program.

Acknowledgments

The CDSS thanks the Health and Human Services Agency in El Dorado County for hosting the field monitoring visit. The CDSS appreciates the open collaboration with CWD staff to ensure the continued success of the CalWORKs program.

Field Monitoring Visit Summary

Introduction

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Background and Data

El Dorado At-a-glance

Total Caseload	996
(Source: CalWORKs Cash Grant Caseload Movement Report CA 237 CW Line Item 8a-December 2013)	
WTW Enrollees	421
(Source: CalWORKs Welfare-to-Work Monthly Activity Report WTW 25/25A Line Item 1-December 2013)	
Mandatory Participants (enrollees + sanctioned + non-compliance)	656
(Source: CalWORKs Welfare-to-Work Monthly Activity Report WTW 25/25A Line Items 1, 3A, and 31-Decer	mber 2013)
Reengagement Plan Received	Yes
Beginning Date of Reengagement	January 18, 2013
Consortium System	C-IV

Data/Statistics:

- Sanctions that were cured as a result of SB 1041: 0.
- Former short-term young child exempt clients (Assembly Bill [AB] X4 4) that have been reengaged: All formerly exempt (AB X4 4) clients that remain on CalWORKs have been reengaged.
- WTW plans that have changed as a result of SB 1041 implementation: This information is not readily available as data collection statistics were not required. All active WTW plans have been updated to the new WTW 2.
- Clients that have used the new once in a lifetime young child exemption: 41.

Summary of Documents provided by El Dorado County:

- Instructional announcements provided by the county to staff relevant to SB 1041 implementation.
- Informing notices and flyers provided to clients relevant to SB 1041 implementation.
- SB 1041 related training materials (formal and informal) including but not limited to training presentations, training practice scenarios, checklist tools, journal templates, flow charts, reference sheets, and materials distributed during staff meetings.
- El Dorado County's Reengagement Sequencing Plan.

County Administrator and Caseworker Interviews

The CDSS Field Monitoring Team used the county administrator and caseworker interview tools released in All County Information Notice I-42-13 to interview county administrators and caseworkers in-person regarding SB 1041 implementation. The tool was provided to the county administrators and caseworkers in advance of the visit. The administrator interview panel consisted of four CDSS staff with two county administrators. The caseworker interviews were conducted by four CDSS staff members with two caseworkers.

Summary of Observations

WTW 24-Month Time Clock Implementation and New WTW Participation Requirements

For clients with less than 24 months left on their CalWORKs 48-month time limit

The WTW 24-Month Time Clock General Informing Notice (CW 2205) was sent to clients on December 1, 2012, by the Statewide Automated Welfare System Consortium-IV (C-IV).

A letter was sent to all clients with less than 24 months on their CalWORKs 48-month time limit that informed them of the new WTW rules and encouraged them to contact their case manager in order to schedule an appointment to discuss the new rules. The case manager was able to discuss the new rules over the phone or schedule an in-person interview with the client. As clients were seen by case managers, the new rules were explained and the new WTW Plan Activity Assignment (WTW 2) and plans are signed.

Comprehensive discussions with clients with less than 24 months left on their CalWORKs 48-month time limit began on January 2, 2013. At the time of the visit, all comprehensive discussions had been completed.

The majority of clients with less than 24 months left on their CalWORKs 48-month time limit chose to lower their participation hours for activities other than employment. Employed clients in this population generally did not change their hours. However, a portion of clients are also responding to the flexibility of the WTW 24-Month Time Clock and are focusing on adult basic education or completion of a general educational development (GED) upfront.

For clients with more than 24 months left on their CalWORKs 48-month time limit

El Dorado County began comprehensive discussions with clients with more than 24 months left on their CalWORKs 48-month time limit on January 2, 2013. At the time of the visit, all comprehensive discussion had been completed. As with clients who had less than 24-months left on their CalWORKs 48-month time limit, the majority of clients chose to lower their participation hours for activities other than employment. Employed clients in this population generally did not change their hours. However, a portion of clients are also responding to the flexibility of the WTW 24-Month Time Clock and are focusing on adult basic education or completion of a general educational development (GED) upfront.

Clients who failed to attend SB 1041 appointments

Active/mandatory clients that were participating in WTW activities were scheduled for an appointment to meet with their employment counselor for an explanation of the new WTW 24-Month Time Clock and the new hourly participation requirements. El Dorado County reported that they did not have a high number of clients failing to attend their scheduled appointments. If a client failed to attend the employment counselor meeting, the noncompliance process was initiated by sending a Notice of Action (NA 840) form. For clients with less than 24 months on their clock, they were allowed to continue with their current activities. If a client was unsuccessful in their activity, the normal noncompliance process would be followed.

General Comments

Supervisors were responsible for monitoring staff progress on comprehensive discussions and appropriate timeframes for noticing. Caseworkers used manual tracking sheets prior to automation of C-IV. The New Rules for CalWORKs Welfare-to-Work Activities form (CW 2206) was inserted into all of the appraisal packets to ensure that necessary information was given to all clients and that all of the information was fully reviewed with clients. The WTW 24-Month Time Clock checklist and insert for the WTW Handbook were tools used by employment counselors to complete the comprehensive discussions.

El Dorado County had a case manager specifically assigned to reach out to the sanction caseload. The case manager has been outreaching to clients to inform them of the new participation requirements. Recently, the sanction caseload has been dispersed to all case managers to ensure each client is contacted promptly. This has resulted in increased participation and cured sanctions.

Due to the significant changes in the WTW program, the Your WTW 24-Month Time Clock Informing Notice (CW 2208) had not yet been issued to clients. At the time of the visit, El Dorado County noted the development of a process with their CalWORKs Eligibility team to distribute the CW 2208 at intake and renewals.

Strategies used by staff to complete all comprehensive discussions with their clients included printing the workload inventory page in the C-IV system, scheduling employment counselor meeting appointments, mailing the CalWORKs Exemption Request (CW 2186A) form with the appointment letter, preparing the WTW 24-Month Time Clock checklist, ensuring the new program information insert is attached to the WTW 2, reviewing the checklist and WTW handbook at the employment counselor meeting with the client, signing a new WTW 2, and starting the WTW 24-Month Time Clock if appropriate.

During the staff meeting, caseworkers discussed weekly participation requirements, changes to core/noncore hours, how the client's choice of activity may affect his or her WTW 24-Month Time Clock, and how cash aid may be lowered if the client is not meeting core participation hours once his or her WTW 24-Month Time Clock has expired. Discussions at these meetings also explained the different types of exemptions, including the once in a lifetime young child exemption, care of a first child exemption, and subsequent child exemptions. Caseworkers discussed the option of using the care of a first child exemption, if eligible, instead of the young child exemption if the client is planning on expanding their family. The WTW Handbook was reviewed and the WTW 24-Month Time Clock checklist was used to ensure all information was adequately covered. Caseworkers noted that clients are motivated by the lowered hours and elimination of core/non-core activities, especially clients in community college and vocational education.

A typical caseworker in El Dorado County carries roughly 80 to 90 cases. Both caseworkers interviewed had completed all comprehensive discussions for clients in their caseload. Employed clients are typically not opting to reduce their hours because they do not want to reduce their income and prefer to continue working their currently scheduled hours.

Caseworkers feel that clients understand the new program changes. Clients in El Dorado County attend a one-on-one WTW orientation that reviews the WTW 24-Month Time Clock and the available activities. At the orientation, an appraisal and assessment is conducted during which the WTW Handbook and time limits are reviewed, a WTW 24-Month Time Clock checklist is utilized, and all client questions are addressed. The appraisal appointment typically lasts one and a half to two and a half hours. Clients are asked about their employment and family goals during the interview. Caseworkers review the self-appraisal with clients to identify strengths and possible barriers.

The caseworker will help the client strategize how to reach their goals. Clients that are participating in job skills placement or work experience choose to meet core hours so their WTW 24-Month Time Clock does not tick. Caseworkers utilize the C-IV system functionality to document a client's "short-term and long-term employment goals." Caseworkers also collaborate with the WIA program which offers a comprehensive range of workforce development activities. Available workforce development activities can benefit job seekers, laid off workers, youth, incumbent workers, new entrants into the workforce, veterans, persons with disabilities and employers. The purpose of these activities is to promote an increase in the employment, job retention, earnings, and occupational skills of participants.

El Dorado County has a good relationship with the community colleges. Staff from the community colleges will attend unit meetings to obtain information and provide updates on clients. Caseworkers collaborate with the community colleges to ensure student attendance is maintained and that all necessary materials were obtained by the student. In order to guarantee that students have the necessary materials, the community college bookstores will provide the client with the required books prior to receiving payment once they have confirmation from the county regarding pending reimbursement.

New Young Child Exemption

The majority of eligible clients in El Dorado County are choosing to take the new young child exemption. At the time of the visit, they had 94 clients using the new young child exemption.

General Comments

El Dorado County noted that both the reengagement population and some of the new population are opting to take the new young child exemption. Caseworkers confirm that all clients thoroughly understand that the exemption can only be used once and they cannot return to the exemption after a break in aid.

Clients with Good Cause for Lack of Supportive Services

El Dorado County did not report any occurrences of clients receiving good cause for lack of supportive services.

The new WTW Plan Activity Assignment (WTW 2)

El Dorado County has been using the new WTW 2 since January 2013. Prior to the availability of the new form in the C-IV system in March 2013, El Dorado County staff retrieved the WTW 2 from the CDSS website.

General Comments

The caseworkers noted that there are both positive and negative aspects of the WTW 2 form. The positive features are that the WTW 2 form does list the activities that the client must be engaged in and the supportive services that are available, and clearly notes the minimum hourly requirement per week. The caseworkers felt the new WTW 2 form was difficult for clients to understand. The WTW 2 form is redundant and lists the activities in four separate locations.

Caseworkers noted that clients do not pay attention to the WTW 2 form once they have initialed the check boxes on the first page. Caseworkers also note that the size of the font is too small.

Reengagement Process

El Dorado County's reengagement process for AB X4 4 clients officially began on January 2, 2013. The CW 2206 mass mailer was sent on January 2, 2013 to the four groups listed in their reengagement sequencing plan (see below). The date that reengagement began indicates the date that each group began their reengagement appointments following the notification requirements as specified in ACL 13-01. El Dorado County management considered the pros and cons for engaging each population and determined the sequence.

El Dorado County's Sequencing Plan is as follows:

- January 18, 2013- All exempt volunteers who are currently attending school.
- March 1, 2013- All remaining exempt volunteers.
- April 1, 2013- All AB X4 4 exempt clients whose children have aged out as of January 2013.
- May 1, 2013 January 1, 2015- All remaining AB X4 4 exempt clients.

El Dorado County began WTW reengagement orientation appointments in March 2013. Exempt volunteers were scheduled to meet one-on-one with their current case manager. During the orientation, the case managers conducted one-on-one appraisal and assessment for the clients. The orientation covered WTW program requirements, the WTW 24-Month Time Clock, the CalWORKs 48-month time limit, participation hours, the ability to volunteer for additional hours, available activities, counseling services, child care, transportation, ancillary, exemptions, sanctions, the WTW Plan Rights and Responsibilities (WTW 1), the WTW Handbook, and the WTW 24-Month Time Clock checklist. Past work history is discussed, family and employment goals are identified, and the self-assessment is reviewed. Based on this information, case managers helped guide each client regarding what is needed to reach his or her goal and addressed how to support each client. Case managers worked with each client to determine activities and exemptions as appropriate and to sign an applicable WTW plan.

Reengagement of AB X4 4 exempt clients was conducted as each group was scheduled in sequence. This allowed clients to remain exempt so months did not tick towards their CalWORKs 48-month time limit until they were reengaged.

General Comments

El Dorado County's approach was to start by focusing on exempt volunteers. Caseworkers reviewed their active cases for any exempt volunteers that were participating or attending school. Case managers reached out to clients by phone to see if any were interested in continuing as an exempt volunteer using the new young child exemption. Those clients who did not want to continue in an exemption were brought in to sign a new WTW 2 plan and became mandatory participants.

Caseworkers then reviewed cases that were exempt or were identified as having a child under the age of two years who had not yet been brought into the WTW program for potential eligibility for a young child exemption.

These cases were sent the "message from your worker" letter through the C-IV system. This letter explained that the client was potentially eligible for an exemption and included the process to request the exemption, and also requested the client's signature within ten days. Along with this letter, the client received the CW 2206, CW 2205, and CW 2186A forms.

Cases that had children who had aged out of the AB X 4 4 exemption and did not have any other children under two or did not respond to the initial meeting were sent an appointment letter to be brought back into WTW.

El Dorado County staff felt that the reengagement process was working well and county staff have been able to quickly adjust as challenges occur. There was one case manager assigned specifically to reengagement clients who was responsible for noticing clients and scheduling appointments.

Implementation Strategies

El Dorado County prepared for implementing the SB 1041 related program changes by doing the following:

- Researching the legislation and reading information provided by the CDSS;
- Analyzing ACLs as they were published;
- Sending out notices per ACLs;
- Attending Mountain Valley regional meetings to discuss changes and implementation strategies;
- Informing staff of potential changes;
- Training staff on the changes and providing direction and guidance for implementation;
- Determining the groups for the reengagement sequence;
- Working with contracted service providers and adapting service when able;
- Involving internal partners in discussions and programmatic decision making;
- Updating the WTW handbook, job club curriculum, and other materials to correctly reflect the changes;
- Determining verbiage for client correspondence;
- Developing a checklist of the new program changes for staff to use in their discussions with clients; and
- Developing journal entry templates to ensure staff are covering the information at appropriate times.

The county released a series of staff emails providing clarification on additional issues and as a follow up to staff trainings:

- Exemption excel lists (February 21, 2013);
- Release of ACL 13-59 with Questions and Answers (July 16, 2013);
- Clarification on the new young child exemption (September 12, 2013);
- Training on the WTW 24-Month Time Clock provided at the CDSS CalWORKs Training Academy (December 4, 2013); and
- WTW 24-Month Time Clock calendars (December 19, 2013).

El Dorado County provided training to staff on the new WTW 24-Month Time Clock, new WTW participation requirements, reengagement, the new young child exemption, and the new WTW 2 form. Training was presented via PowerPoint presentations and handout material. As new ACLs or clarification on existing ACLs become available, the county continues to update their staff. Training has been provided at Employment Services joint unit meetings with follow-up at individual team meetings. SB 1041 implementation was introduced on January 9, 2013, at the Employment Services Welfare-to-Work staff meeting. Training also included instructions for the WTW 24-Month/48-Month/federal activity tracking log, C-IV updates, and sample case processing scenarios. During an additional staff meeting, the WTW 24-Month Time Clock was introduced and training provided. This training included a checklist that was created to review with clients during an initial appraisal/assessment, and the CW 2186A was also reviewed with staff to answer questions regarding the form. On February 12, 2013, training was provided on the new WTW 2 form. The training included page by page review of the new WTW 2 form.

Additional efforts were made to support the transfer of knowledge to staff, including clarification emails with questions and answers sent to all staff. The C-IV journal templates were updated to include the new young child exemption information. An insert with all the program changes noted was created and attached to the WTW Handbook. Supervisors have an open door policy for questions that occur during client interviews.

Program supervisors were involved in trainings and were well versed on the ACLs relevant to their assigned lead area. Supervisors shared either the actual ACLs or information from the ACLs with their team during unit meetings. Additional information on program changes was provided during monthly joint unit meetings. To ensure staff understood the changes, the supervisors monitored their progress through interview observations and targeted case reviews.

General Comments

El Dorado County utilized the CDSS Training Aid to train county staff. County staff discussed the new program changes including the WTW 24-Month Time Clock and any relevant exemptions with clients. Caseworkers were encouraged to help clients make an informed decision and to determine what was the best plan for each client. County staff recognized that the WTW 24-Month Time Clock rules provide more flexibility for clients to attend activities of their choice. Caseworkers were kept informed as additional services became available to clients, such as the increased number of hours that clients could attend adult basic education since core requirements changed.

Another challenge for El Dorado County's implementation was the shortage in staff for periods of time during implementation. Training on several ACLs had been issued during the time period in which there was high staff turnover and replacement staff were not fully trained in the case manager position.

Case Reviews

The CDSS Field Monitoring Team reviewed five cases selected by the CWD in advance of the visit. The purpose of this component of the visit is to review how SB 1041 program changes are being integrated into case management, understand how SB 1041 policies are being operationalized by the caseworker, and better comprehend case management within the county.

There were five specific case types requested:

- Case One-a client with less than or equal to 24-months left on the CalWORKs 48-month time limit as of January 1, 2013;
- Case Two-a client with more than 24-months on the CalWORKs 48-month time limit as of January 1, 2013;
- Case Three-a new client (beginning date of aid January 1, 2013 or later);
- Case Four-a client who is sanctioned that has earnings and is curable based on the new participation requirements (may be a case actually cured since January 1, 2013 based on new participation requirements); and
- Case Five-a client that is part of the former short-term young child exemption (AB X4 4)/ reengagement population, and is currently in the process of or has been reengaged.

General Comments

El Dorado County uses the C-IV case management system. The following is a summary of the case findings:

- All clients received the CW 2205 in November 2012. The CW 2208 was not utilized or issued.
- Comprehensive discussions were being completed and noted within case files and the new WTW 2 was being used and kept on file. Short and long term goals were reflected in the cases.
- One client was reengaged and opted to take advantage of the new lower hourly requirement for an adult with a child under six years of age by obtaining employment for 20 hours per week.
- Supportive services offered and/or issued were being documented in all case files.
- A learning disability screening was offered and waived or declined by all clients.
- Two clients were eligible for the new young child exemption and opted to use it.

Conclusion

Successes

El Dorado County provided thorough training to staff on the SB 1041 related program changes, and the county continues to update staff as new ACLs become available. Information and tools were also shared through emails, clarification/question and answer lists, presentations, case scenarios, flow charts, checklist tools, journal templates, and other handout material.

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Challenges

El Dorado County found it was difficult to implement the new program changes within the given timeframe. Guidance released from the CDSS was distributed in a short time frame which limited time available to adequately train staff. In addition, the county noted that clients struggle with understanding such a significant amount of SB 1-41 related changes in a short time.

High staff turnover created challenges during implementation. With the staff limitations, it was difficult to ensure that all staff was successfully trained and able to implement all the changes in a timely manner.

There were also delays with automation which led to a manual tracking process. The inability to accurately track client participation hours in C-IV led to a need for manual calculation of client hours throughout the month to ensure they are meeting their minimum weekly participation requirement.

Key Recommendations

El Dorado County reported delays in the automation of C-IV hindered their ability to ensure that all notices were delivered via automated system and that manual work around were labor intensive and difficult to track. The CDSS suggest that El Dorado County seek out a manual tracking system in the event that automation is delayed in the future. The county should also collaborate with C-IV staff to ensure that the automation to track the Welfare-to-Work 24-Month Time Clock is accurately and efficiently updated within the C-IV consortium and the Welfare Data Tracking Implementation Project (WDTIP) system alike. El Dorado County should communicate any continued automation issues with the C-IV consortium to resolve the situation.

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