

**Senate Bill 1041 Implementation  
Field Monitoring  
Visit Summary**

**Fresno County**

**Visit Date: September 17, 2013**

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

**Fresno County**  
Senate Bill (SB) 1041 Implementation  
Field Monitoring Visit Summary

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**Executive Summary**

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**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 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**

This one-day field monitoring visit was performed in Fresno County on Tuesday, September 17, 2013, at the Fresno County Department of Social Services Barton Building office in Fresno, CA. The field monitoring visit team included three staff from the CDSS, WTW Division, CalWORKs Employment and Eligibility Branch along with Fresno County's Deputy Director, WTW Program Specialist, two county caseworkers (Job Specialists), and various program managers with focus' in staff Training and Development, Fraud, and Workforce Development. The field monitoring visit consisted of a kick-off meeting, close-out meeting, staff and administrator interviews, and case management observations with county staff.

## **Implementation Strategies**

Fresno County's implementation strategy consisted of a layered approach to inform staff of SB 1041 related program changes which included direct staff correspondence, timely Policy and Procedure Manual updates, class room style instructor lead training, and the creation of various comprehensive job aids.

In December 2012 Fresno County began issuing to all staff a number of Director's Office Memorandums which addressed SB 1041 program changes and implementation strategies. Once Policy and Procedure Guide updates were complete, they took the place of these Director's Office Memorandums and the Director's Office Memorandums were retired. In February 2013 all staff were trained in person on the SB 1041 program changes and implementation strategies. This training program was offered to both central Fresno metropolitan staff, and also a roadshow was initiated in order for out stationed staff in rural offices to be trained. Formal reengagement process training was provided to all staff in September 2013. Checklists, including the Comprehensive Discussion Client Review Sheet (ES0213), were provided and required to be used by Job Specialists in order to ensure all components of the comprehensive discussion were covered with each client.

Ultimately all Job Specialists were instructed to work with clients to maximize their benefits. Job Specialists were trained to focus on activities that would help the client preserve his or her individual WTW 24-Month Time Clock for the future, but ultimately it was the client's decision on whether to participate in activities that either utilized the WTW 24-Month Time Clock's flexibility or participate in activities which would preserve their clock for future use.

## **Successes**

Fresno County's approach to SB 1041 implementation was well organized and executed. This enabled Fresno County's Job Specialists to provide clients with thorough comprehensive discussions regarding SB 1041 program changes. Fresno County has also been a key contributor and collaborator on the various workgroups related to SB 1041 program changes and is one of two chairs on the County Advisory Team (CAT). This participation is believed to have contributed to Fresno County's ability to react and adapt quickly to the program and policy changes related to SB 1041 implementation. Also, Fresno County's current approach to assisting CalWORKs clients with domestic abuse or behavioral health needs has prepared it for implementation of the Family Stabilization program.

## **Key Recommendations**

Fresno County should continue to collect data on their progress of SB 1041 implementation, specifically information related to what sort of participation option clients are opting to take advantage of (WTW 24-Month Time Clock or CalWORKs federal standards). The CDSS also recommends that Fresno County continue to pay close attention to the data which is submitted through their consortium system to CDSS for the monthly CalWORKs Cash Grant Caseload Movement Reports (CA 237 CW), and CalWORKs WTW Monthly Activity Reports for All (Other)

Families and Two Parent Families (WTW 25/25A). These sources are relied upon heavily by the CDSS to track and measure program progress.

Fresno County currently notifies clients who are partially participating or not participating in WTW of regularly scheduled informative sessions during which clients receive information on the benefits of participating in WTW and what they need to do in order to engage back into the program. The CDSS recommends that Fresno County expand its outreach efforts to this population of clients in order to continue encouraging client participation in CalWORKs WTW activities and services.

### **Acknowledgments**

The CDSS thanks the Fresno County Department of Social Services for hosting this 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**

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### **Introduction**

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## Background and Data

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### Fresno at-a-glance

Total Caseload .....	<b>27, 665</b>
(Source: CalWORKs Cash Grant Caseload Movement Report [CA 237 CW] Line Item 8-June 2013)	
WTW Enrollees .....	<b>8,037</b>
(Source: CalWORKs WTW Monthly Activity Report [WTW 25/25A] Line Item 1-June 2013)	
Mandatory Participants (enrollees + sanctioned + non-compliance) .....	<b>11,254</b>
(Source: CalWORKs WTW Monthly Activity Report [WTW 25/25A] Line Item 1, 3A, and 31-June 2013)	
Reengagement Plan Received .....	<b>Yes</b>
Beginning Date of Reengagement .....	<b>September 2013</b>
Consortia System .....	<b>CalWIN</b>

### Data/Statistics Available at Time of Field Monitoring Visit

- Clients who have had their comprehensive discussion: **8,674 (96% of clients required to have comprehensive discussion)**
- Sanctions that were cured as a result of SB 1041: **Nine**

### Summary of Documents provided by Fresno County

- Fresno County's Director's Office Memorandums relevant to SB 1041 program changes.
- Policy and Procedure Guide updates relevant to SB 1041 program changes.
- SB 1041 related training materials including PowerPoint presentations on various SB 1041 topics.
- CalWORKs notifications including informing notices, letters and flyers provided to clients relevant to SB 1041 implementation.
- Various checklists and flow charts created by Fresno to assist staff in performing comprehensive discussions with clients and assist clients in understanding SB 1041 related program changes.
- Fresno County's Assembly Bill (AB) X4 4 Short-Term Exemption County Reengagement Sequencing Plan.

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## County Administrator and Caseworker Interviews

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The CDSS field monitoring team used the county administrator and caseworker interview tools released in All County Information Notice I-42-13 to interview the Fresno County administrators and Job Specialists in-person regarding SB 1041 implementation. The tools were provided to the Fresno County administrators and Job Specialists in advance of the visit. The administrator interview panel consisted of three CDSS staff and two county administrators. The Job Specialist interviews were conducted by two teams of CDSS staff members (one team of two CDSS staff members, and one team of a single CDSS staff member) with each team interviewing one Job Specialist.

## Summary of Observations

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

#### Transitioning Clients

**[Less than and more than 24 months left on their CalWORKs 48-month time limit as of January 1, 2013]**

Fresno County issued the WTW 24-Month Time Clock General Informing Notice (CW 2205) through the CalWIN consortium system on November 28, 2012, and again on December 7, 2012. Fresno began comprehensive discussions with all clients, regardless of time of aid, in early February 2013. The county's target completion date for comprehensive discussions was September 30, 2013. At the time of this visit in mid-September 2013 Fresno County projected that almost all comprehensive discussions were complete. Job Specialists who were charged with conducting the comprehensive discussions were instructed to include documentation of each comprehensive discussion in the CalWIN case comments, and to include the county created Comprehensive Discussion Client Review Sheet (ES0213) checklist in each case file as further verification that the discussion occurred, when it occurred, and that it covered all requirements.

Fresno reported that in general most clients chose to take advantage of the lower hourly requirements, particularly clients who were eligible for the reduced weekly 20 hour participation requirement. Some clients opted to change activities in order to take advantage of educational opportunities. Some clients, who had previously exhausted their federal 12-month vocational education limit, took advantage of the new flexibility the Welfare-to-Work 24-Month Time Clock provides in order to continue with or focus solely on their educational goals. Overall, Fresno reported that some clients took advantage of both the option to utilize the flexibility of their WTW 24-Month Time Clock, while others chose the option to participate according to CalWORKs federal standards in order to preserve their WTW 24-Month Time Clock for future use. Clients who were working most often chose not to reduce their hours in order to avoid reduction in income.

Comprehensive discussions took between 30 minutes and 1.5 hours to perform. They were done by appointment primarily in person by individual Job Specialists. Fresno County also offered Saturday individual and group session appointments in order to accommodate clients with schedules that were not conducive to Monday-Friday standard business hour appointments. Home visits were also authorized in order to accommodate clients who had extreme scheduling conflicts or, in particular, special needs. These home visits were conducted by Job Specialists who had past experience in performing such visits. Job Specialists used the WTW Plan Activity Assignment (WTW 2) Form and the county specific Comprehensive Discussion Client Review Sheet (ES0213) checklist to explain the SB 1041 program changes and conduct the comprehensive discussion with clients.

#### **Clients who failed to attend SB 1041 appointments**

Fresno County's action towards clients who were unresponsive to contact varied depending on the client's situation. For clients participating in Fresno County's Mental Health program or in-patient Substance Abuse treatment program, their assigned Job Specialist would either attempt to make contact at the site of the client's treatment program or the Job Specialist would initiate a home

visit. Home visits were also authorized in order to attempt contact with clients with a case history of contact difficulty or other special needs. Other opportunities for in person contact were utilized in order to outreach to unresponsive clients, including Saturday group drop in sessions and individual Saturday appointments. If a Job Specialist was unsuccessful in establishing contact with an unresponsive client the non-compliance process was initiated.

### **General Comments**

*Job Specialists were given a weekly updated report which listed cases that still required a comprehensive discussion. Job Specialists were to provide updated reports regularly to their supervisors and management staff on when comprehensive discussion appointments were scheduled with clients, when comprehensive discussions were held and completed, when cause determination appointments were scheduled, when the non-compliance process was initiated based on lack of response, and when sanction was necessary to impose. Strategies for completing comprehensive discussions and the order by which to contact clients was determined based on individual caseworker and supervisor strategies. Fresno did authorize different forms of contact in order to accommodate clients with difficult schedules or special needs. For example, home visits were authorized in some cases and Saturday appointments. For clients participating in Fresno County's Mental Health program or in-patient Substance Abuse treatment program, their assigned Job Specialist would either attempt to make contact with the client at the site of the client's treatment program if the client was otherwise non-responsive, or initiate a home visit if necessary.*

*Job Specialists have on average 120 cases. There are specialized case management units which focus on special needs cases (Domestic Abuse, Mental Health, and/or Substance Abuse cases). The Job Specialists in these units have reduced case loads.*

### **New Young Child Exemption**

Fresno County had some clients choose to take the New Young Child Exemption. Some clients chose to preserve this exemption for future use. Clients that chose to take the New Young Child Exemption were offered the opportunity to volunteer to participate in WTW.

### **Clients with Good Cause for Lack of Supportive Services**

Fresno County did not utilize the AB X4 4 option to provide clients with WTW good cause due to lack of supportive services with a CalWORKs 48-month time limit exemption.

### **The New WTW Activity Assignment Plan (WTW 2) Form**

The new WTW Plan Activity Assignment (WTW 2) Form was made available via the CDSS website December 2012. In January 2013 Fresno County added the version of the form available through the CDSS' website to its internal database which allowed staff to generate the form prior to full CalWIN automation. In general, Job Specialists used the WTW 2 as a tool to explain what activities were available for clients to participate in and the difference between utilizing the WTW 24-Month Time Clock and utilizing CalWORKs federal standards. In addition to the WTW 2, Job Specialists

completed a WTW Plan Assessment and a WTW Action Plan (ES73) to identify employment goals, short-term goals and long-term goals.

### **General Comments**

*Both Fresno County Job Specialists and the county administrators noted that the expanded supportive services section of the WTW 2 has helped clients understand the services available to them. Fresno historically used a separate form to identify needed supportive services. The new version of the WTW 2 with its expanded supportive services page allows for the elimination of that extra form. Fresno County also noted that the front page of the WTW 2 which includes double columns, reflecting the two different types of participation requirements (WTW 24-Month Time Clock and CalWORKs federal standards) is confusing. Also, there has been difficulty understanding how to complete the WTW 2 for clients in two-parent households sharing the participation requirement. One Job Specialist suggested moving the activity scheduling information to the front page in order to highlight the critical and specific information the client needs in order to comply with the program.*

### **Reengagement Process**

Fresno County's reengagement process officially began in September 2013. In anticipation of reengagement beginning, the county issued the Young Child Exemption Ends December 31, 2012 - New Rules for CalWORKs WTW Activities Informing Notice (CW 2206) to all short term young child exempt (AB X4 4) clients on July 16 and 17, 2013, via mass mailer. Starting in the month of September 2013 clients were to be issued a reengagement evaluation notice and either directed to the orientation/appraisal/assessment process or to an appointment with their assigned Job Specialist to discuss options. Which avenue each client was directed to take depended on where in the WTW Flow they were at prior to becoming exempt.

Job Specialists were directed to send the reengagement evaluation notice appointment letter at least 30 days prior to each client's scheduled reengagement evaluation appointment. In addition, the county planned to conduct the required third contact prior to the reengagement appointment date either by phone or by whatever means were most conducive. Fresno plans to complete reengagement of short term young child exempt (AB X4 4) clients by the end of December 2013.

Fresno County's Reengagement Sequencing Plan is as follows:

- **September 1, 2013** - First, engage clients with zero – three months of CalWORKs time on aid remaining. Second, engage clients with four – 23 months of CalWORKs time on aid remaining.
- **December 1, 2013** - Engage clients with more than 24 months of CalWORKs time on aid remaining.

For clients who requested to reengage early, Job Specialists in Fresno County were instructed to explain to the client his or her options, explain when they would have originally been contacted and required to reengage, and that the client would be considered a WTW mandatory participant and would have participation requirements upon reengagement. Fresno County created a

checklist of items to cover with each client which Job Specialists were required to use for these types of situations. If the client chose to reengage early, Job Specialists were required to document the client's decision in the CalWIN case comments.

Short term young child exempt (AB X4 4) clients who were volunteering in the program prior to January 1, 2013, were allowed to continue volunteering. If the client's volunteering activity ended prior to reengagement, the Job Specialist was directed to schedule an appointment with the client to begin reengagement.

### **Implementation Strategies**

Fresno County's implementation strategy consisted of a layered approach to inform staff of SB 1041 related program changes which included direct staff correspondence, timely Policy and Procedure Guide updates, class room style instructor lead training, and the creation of various comprehensive job aids.

Fresno County initially formed an internal workgroup comprised of Program Managers, supervisors, Job Specialists, and staff training and development representatives with the goal of mapping out a plan for SB 1041 implementation. In December 2012 Fresno County began issuing to all staff a number of Director's Office Memorandums which addressed SB 1041 program changes and implementation strategies. Once Policy and Procedure Guide updates were complete, they took the place of these Director's Office Memorandums and the Director's Office Memorandums were retired.

In February 2013 all staff were trained in person on the SB 1041 program changes and implementation strategies. Fresno County's staff training and development representatives created training packets for individual staff members and hosted in person training opportunities. This training program was offered to both central Fresno metropolitan staff, and also a roadshow was initiated in order for out stationed staff in rural offices to be trained. Formal reengagement process training was provided to all staff in September 2013. Fresno County also conducted training with contractors and local advocacy groups, and utilized its monthly collaborative meeting with local Community College partners to discuss SB 1041 related program changes and to share implementation strategies.

As additional questions and issues arose, they were addressed via additional Director's Office Memorandums. Larger issues were addressed in additional formal training as described above. Additional questions and issues were also addressed during bi-weekly Employment Services Supervisor meetings. Job Specialists and other Fresno County staff also self-initiated review of CDSS All County Letters as they were issued. All training materials have been reviewed and are found to meet CDSS requirements. Checklists, including the Comprehensive Discussion Client Review Sheet (ES0213), were provided and required to be used by Job Specialists in order to ensure all components of the comprehensive discussion were covered with each client. Program Managers also conducted role playing sessions within their section meetings to ensure each supervisor could convey SB 1041 implementation expectations to their staff.

Ultimately all Job Specialists were instructed to work with clients to maximize their benefits. Job Specialist were trained to focus on activities that would help the client preserve his or her individual WTW 24-Month Time Clock for the future, but ultimately it was the client's decision on whether to participate in activities that either utilized the WTW 24-Month Time Clock's flexibility or participate in activities which would preserve their clock for future use.

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## Case Reviews

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The CDSS field monitoring team reviewed five cases selected by Fresno County in advance of the visit. The purpose of this component of the visit was to review how SB 1041 program changes are being integrated into case management, understand how SB 1041 policies were being operationalized by individual Job Specialists, and better comprehend case management within Fresno 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 was sanctioned, had reported earnings and whose case was curable based on the new participation requirements (preferably a case actually cured since January 1, 2013, based on new participation requirements); and
- Case Five - A client that was part of the short term young child exemption (AB X4 4) population, and was in the process of or has been reengaged (if applicable).

### ***General Comments***

*Fresno County uses the CalWIN case management system. The following is a summary of the case findings:*

- Noticing Requirements  
All noticing requirements were met with the exception of the Your WTW 24-Month Time Clock Notice (CW 2208). No clients had received this notice required by All County Letter 13-12 at the time of the visit. Fresno County was awaiting clarification on how to determine when a client was meeting participation requirements based on the new CalWORKs federal standards and the workaround process from their consortium in order to implement the CW 2208. At the time of the visit, Fresno County was planning to begin issuing the CW 2208 to clients in October 2013.
- Comprehensive Discussions and Additional Outreach  
The two transitioning cases reviewed had received a comprehensive discussion. Notation of these discussions took the form of notes in the case comments section of CalWIN. Also, clients were required to acknowledge that the comprehensive discussion had occurred by signing the Comprehensive Discussion Client Review Sheet (ES0213).

Signed copies of these sheets were in the case files. For the sanction case, the client was noted as not interested in fully participating in WTW. For the reengagement case reviewed, due to Fresno being in the initial stages of its reengagement process, the client had yet to receive a comprehensive discussion. The new client case file was not assessed for this requirement as new clients receive the comprehensive discussion components as part of orientation.

- Welfare-to-Work Plan Activity Assignment (WTW 2) Form  
All case files with WTW plans developed on or after January 2013 (the new case and one of the transitioning cases) used the new WTW 2. For the other transitioning case, a new plan had not yet been developed due to the client being fully employed. The Job Specialist for this case had commented that an appointment would be set up for this particular client in the near future to discuss options and if necessary, sign a new WTW 2. The reengagement case was still in the early stages of the reengagement process (CW 2206 stage).
- Sanction Case  
For the sanction case, the client had declined engagement despite new lower hourly requirements and WTW 24-Month Time Clock options.
- Reengagement Case  
The case reviewed met the initial reengagement noticing requirements (CW 2206). The case had yet to come up in the queue for reengagement evaluation notice outreach.
- New Young Child Exemption  
Only one case reviewed was eligible for the New Young Child Exemption. The client had declined the exemption.

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## Conclusion

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### Successes

Fresno County's approach to SB 1041 implementation was well organized and executed. The county developed an extensive amount of informative documents (Director's Office Memoranda), quickly and effectively updated Policy and Procedure Guides, and offered staff a variety of training opportunities ranging from class room style training to informal staff meetings where implementation strategies and potential challenges and questions could be discussed openly. This county has also continued to offer ongoing training to staff as further policy decisions are issued by the CDSS. Fresno developed checklists for staff to use in order to better understand program changes related to SB 1041 and to assure clients understand the new activity options/flexibility that is available to them. This enabled Fresno County's Job Specialists to provide clients with thorough comprehensive discussions regarding SB 1041 program changes.

Fresno County has also been a key contributor and collaborator on the various workgroups related to SB 1041 program changes and is one of two chairs on the County Advisory Team (CAT). CAT

meetings are held monthly and provide an opportunity for counties throughout the state to share their promising practices and discuss procedural and process issues and challenges. Fresno County's participation in these groups has kept this county up to date on all forthcoming policy changes. This participation is believed to have contributed to Fresno County's ability to react and adapt quickly to the program and policy changes related to SB 1041 implementation.

Before SB 1041 implementation, Fresno County already had many collaborative efforts in place designed to assist their clients in obtaining the skills and resources they need in order to succeed in the program. One example of this is Fresno County's participation in a pilot project with the "Learn2Earn" Partnership. "Learn2Earn" is a major campaign to assist Fresno's residents in obtaining their General Education Development (GED) and High School Equivalency. By participating in this pilot, Fresno County is working to assist clients to increase their level of education which will make them more competitive in the local job market. Also, due to public transit connectivity issues in the Fresno metropolitan region, Fresno County has worked to develop intercity agreements in order to best accommodate client's needs and save money on transit transfers. An agreement with a local economic development group to operate shuttle services has also been implemented in order for clients in areas underserved by public transit to have additional transit options.

Fresno County has also nurtured a continued collaborative relationship with its local advocacy groups and Community Colleges in order to further assist clients to the best of its ability. Fresno County currently holds regular meetings with Community College Counselors and advocacy groups in order to assure process and policy issues presented by these groups have an avenue by which to be expressed, discussed, and potentially remedied.

Fresno County is also prepared to integrate program changes such as the Family Stabilization program, effective January 1, 2014, into its current WTW program. The county already organizes its caseload based on need. Clients in need of more aggressive behavioral health treatment or domestic abuse services are currently assigned to a specialized group of Job Specialists. This Special Needs Unit allows for more intensive case management by these staff. It is believed that Fresno County's approach to assisting CalWORKs clients with domestic abuse or behavioral health needs has readily prepared it for implementation of the Family Stabilization program.

## **Challenges**

Fresno County found that their greatest challenge was the limited time frame allowed for SB 1041 implementation, including the June 30, 2013, deadline established to complete outreach to all transitioning WTW clients. Unfortunately, the county was unable to make this deadline. All outreach and comprehensive discussions were completed for this population by the time of this visit, September 2013. Also the delay in the issuance of instruction by CDSS was a hardship; the continued issuance of Question and Answer All County Letters to clarify policy has been beneficial.

## Key Recommendations

Fresno County should continue to collect data on their progress of SB 1041 implementation, specifically information related to what sort of participation options clients are opting to take advantage of (WTW 24-Month Time Clock or CalWORKs federal standards). The CDSS also recommends that Fresno County continue to pay close attention to the data which is submitted through their consortium system to CDSS for the monthly CalWORKs Cash Grant Caseload Movement Reports (CA 237 CW), and CalWORKs WTW Monthly Activity Reports for All (Other) Families and Two Parent Families (WTW 25/25A). These sources are relied upon heavily by the CDSS to track and measure program progress.

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## Contact

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