

# MONTEREY COUNTY

California Outcomes and Accountability Review (Cal-OAR)  
System Improvement Plan (SIP)

CalWORKs Employment  
Services

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## Cal-OAR Report Signature

For submittal of  Cal-CSA  Cal-SIP  Cal-SIP Progress Report

<b>County</b>	County of Monterey
<b>Submission Date</b>	February 13, 2024
<b>Cal-CQI Cycle</b>	2021-2026 Cycle
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<b>Name</b>	
<b>Title/Position</b>	
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Sign, scan, and submit the Signature Sheet along with the Cal-OAR Report to your county's SFT site.

## Executive Summary

### 1. Performance measures selected for improvement

Sanction Rate  
Sanction Resolution Rate  
Orientation Attendance Rate

### 2. A list of improvement strategies identified within the Cal-SIP

Monterey County seeks to improve performance in the Cal-OAR Sanction Rate, Sanction Resolution Rate, and Orientation Attendance. Monterey County seeks to improve performance in the Cal-OAR Sanction Rate, Sanction Resolution Rate, and Orientation Attendance Rate by implementing the following strategies:

Efforts to improve performance in the Sanction Rate will focus on three (3) strategies. The first strategy is to designate CalWORKs Employment Services (CWES) staff to establish ongoing and focused sanction cure efforts. With the establishment of the sanction cure unit, the next strategy is to develop, distribute, and report on a monthly survey to CWES families in a Welfare-to-Work sanction program status. In anticipation that monolingual Spanish speaking families working in agriculture will be overrepresented in the Sanction Rate, Monterey County will concurrently develop appropriate monolingual Spanish language electronic learning (E-learning) activities aimed to support agricultural families to meet their self-sufficiency goals and participation requirements during the off-season. The goal of the three (3) strategies is to reduce the Sanction Rate to 28% by June 2026.

Efforts to increase the Sanction Resolution Rate will also focus on three (3) strategies. The first strategy is to utilize the established sanction cure unit developed to improve performance in the Sanction Rate. The second strategy is to use the data from the monthly survey provided to families in a Welfare-to-Work sanction program status to inform the efforts of the Sanction Cure unit. The Sanction Cure unit will use the information from the monthly survey to provide intensive case management for families in Welfare-to-Work program status of non-compliance and status reason of curing WTW sanction. The goal of the three (3) strategies is to increase the Sanction Resolution Rate to 8% by June 2026.

Efforts to improve performance in the Orientation Attendance Rate will focus on three (3) strategies as well. The first strategy is aimed at increasing efforts to schedule and successfully complete the Welfare-to-Work Orientation activity. Simultaneously, Monterey County will also determine if any data entry errors are negatively influencing the accurate recording of successful orientation attendance completion. Similar to the Sanction Cure unit efforts, intensive case management will also be provided for families in Welfare-to-Work program status of non-compliance or sanction and status reason of "no show" to WTW orientation or appraisal activity. The goal of the three (3) strategies is to improve the Orientation Attendance rate to 41% by June 2026.

## County Contact Information

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## Introduction

### Background

Cal-OAR is a local, data-driven program management system that facilitates continuous improvement of county CalWORKs programs by collecting, analyzing, and disseminating outcomes and best practices. As required by Welfare and Institutions Code (WIC) 11523, Cal-OAR consists of three core components: performance indicators, a county CalWORKs self-assessment (Cal-CSA), and a CalWORKs system improvement plan (Cal-SIP).

The Cal-OAR continuous quality improvement (Cal-CQI) process (which includes the Cal-CSA and Cal-SIP) will take place over five-year cycles. The first Cal-OAR cycle commences on July 1, 2021 with the implementation of Cal-OAR.

The Cal-SIP is the third component of the Cal-OAR CQI process. The Cal-SIP is based on the information gathered and reported from the Cal-CSA, each CWD will develop a plan for improving their CalWORKs program. The Cal-SIP will select a set of measures or measure for focused improvements and develop to improve the selected performance measures.

## 1. Describe your approach to the Cal-SIP Report.

The County of Monterey Department of Social Services (DSS) CalWORKs Employment Services (CWES) utilized tools and trainings provided by the California Department of Social Services (CDSS) and the resources available on the CalWORKs Outcomes and Accountability Review (Cal-OAR) website to plan and draft the CalWORKs System Improvement Plan (Cal-SIP) report. CWES Cal-OAR metrics that were not matched to or exceeding Statewide averages had been reviewed and researched by a diverse team spanning all CWES job classifications to include an Office Assistants (OA), Child Care Reimbursement Unit (CCRU) Principal Office Assistant (POA), Employment and Training (E&T) Workers and E&T Lead Workers, E&T Supervisors, Quality Assurance and Quality Control (QA/QC) Staff and Supervisor, Management Analyst (MA II), and the Program Manager.

The Cal-CSA was divided into sections and assigned to two to three members each on the cross functional team. The sub-team members researched their assigned sections and provided their responses and then shared their progress at biweekly meetings. The progress of each sub-team was reviewed by the entire cross functional team and edited or enhanced through discussion and analysis. The results of the cross-functional CWES staff review and research informed data gathering and analysis to enhance services for CalWORKs Welfare-to-Work (WTW) customers in specific program status groups to include Active, Non-Compliant, and Sanctioned WTW program statuses. Customers in these status groups were incentivized to participate in detailed surveys aimed at learning more about their WTW program needs, experiences, and outcomes. Over 300 surveys, nearly a 10% response rate, was received providing information that influenced the County.

Simultaneously, regular monthly and bi-monthly meetings were held with the contracted service providers best positioned to positively influence the opportunity areas for the customers in the identified status groups. Service providers that participated in the monthly and bi-monthly meetings included Goodwill Central Coast (GWCC) in support of the Expanded Subsidized Employment (ESE) Program, First 5 of Monterey County in support of the Home Visiting Program (HVP), local colleges and adult schools to include California State University - Monterey Bay (CSUMB), Monterey Peninsula College (MPC), Hartnell College, the Salinas Unified High School District (SUHSD) Adult School Program supporting Vocational Education (Voc-Ed) Programs and High School Equivalency (HSE) and General Education Diploma (GED) Programs, County of Monterey Behavioral Health Services providing Mental Health (MH), Substance Use Disorder (SUD), Domestic Violence (DV) and Community Family Case Management (CFCM) Program services, The Housing Resource Center (HRC) of Monterey County providing Housing Program Services, The Watsonville Law Center (WLC) providing legal and credit services, the United Way of Monterey County (UWMC) providing Volunteer Program services, the DSS Family and Childrens Services (FCS) providing Family Stabilization child welfare program services, the Community Benefits (CB) leadership team consisting of Management Analysts (MA's), Eligibility Supervisors, and Eligibility Specialists and Workers providing program enrollment, referral, and sanction support, the CWES QA/QC team providing program participation trend information, and Learning Time Inc (LTI) providing assessments, accommodations, and weekly tutoring classed for customers with learning disabilities. A coordination meeting was also held with the local Workforce Development Board (WDB) Workforce Innovation and Opportunity Act (WIOA) staff to coordinate referrals for services between agencies.

The results of the cross-functional review, customer surveys, and service provider meetings, were compiled to identify a minimum of three (3) metrics for which to develop the County System Improvement Plan (SIP).

CWES then enrolled in a County Partner collaboration training with University of California Davis (UC Davis) and the

Cal-OAR team from Humboldt County and vetted the methods and identified areas with a peer group. Peer feedback was provided and used to define the focus areas more clearly for the SIP.

## 2. Briefly describe past and current system improvement efforts.

CWES has fully embraced historical system improvement efforts established by CDSS as well as best practices revealed through ongoing collaborations with the State and Counties at monthly stakeholder meetings.

In 2014, CWES solidified a Continuous Quality Improvement (CQI) model to address sub-optimal Work Participation Rate (WPR) outcomes for All Families and Two Parent Households. When the December 2013 All Families participation rate reached a historic low of 10% participation, CWES invested heavily in CQI practices aimed at meeting or exceeding the All Families WPR rate for subsequent months and years. The CQI practices incorporated included improved tracking and monthly reporting, holding monthly Participation Action Team (PAT) meetings to discuss past, current, and future expectations for All Families participation, fully embracing WTW program enhancements and expansions provided by Assembly Bill 74 to include the Online CalWORKs Appraisal Tool (OCAT), Expanded Subsidized Employment (ESE), and the Family Stabilization Program (FSP), and establishing robust and effective contracts with service providers aimed to deliver a holistic service delivery model to support barrier removal and job readiness activities aligned with the diverse needs of the families participating in CWES services. These practices led to gradual increases in monthly WPR and resulted in a sustained achievement of 50% or higher in monthly WPR.

CQI practices have also been used to ensure Quality Assurance and Quality Control (QA/QC) in WTW case management practices. CWES established a QA/QC unit tasked with reviewing case management actions and tracking and reporting on error trends. Each CWES unit is accountable to review a sample of work from each staff member in a review process that includes the staff member's own review and feedback on discrepancies that are identified. Units are also required to complete quarterly observations of all CWES staff members to include Clerical and Child Care staff and score staff on key customer service and program knowledge metrics that are reviewed and discussed with staff members. CWES is currently in the process of refining and enhancing the Electronic Quality Assessment (EQA) tool to include reviews of 19 established Cal-OAR metrics.

CQI practices were also utilized when embracing the CalWORKs 2.0 (CW 2.0) model in 2016. CWES's focus had already been a holistic program services delivery model focused on barrier removal and goal setting to meet each vulnerable family where they are in their ability to participate in the CalWORKs Employment Services program. When CW 2.0 launched, CWES established a robust training model to ensure all CWES staff were knowledgeable and practiced in the use of the Goal, Plan, Do, Review, Revise (GPDRR) efforts. Employment and Training staff were trained on the importance of the Appraisal Summary Review (ASR) and the completion of the GPDRR process, and the ASR was added to the quality assurance review process. An effort to effectively market the wide array of CW 2.0 services available was undertaken and the services were marketed to CWES families as well as service providers.

CWES established an annual "Celebration of Services" which became a pinnacle year-end event where all program service providers were hosted in a large venue for each provider to share information about the service they provide, how the service is accessed, and success stories of the customers that accessed their services.

CWES has learned and achieved through past CQI measures and is well prepared to implement this Cal-SIP.

### 3. Briefly describe the success or failure of those efforts at improving service delivery or programmatic outcomes.

As mentioned above, CWES has experienced success through CQI in the program areas of Work Participation Rate (WPR), Electronic Quality Assurance (EQA), and CalWORKs 2.0 (CW 2.0). Each of these CQI efforts have been fruitful in meeting the metrics and objectives.

The challenges that CWES has identified with CQI efforts is that a quality focus on specific areas reduces the focus available for other areas. There is a strong desire to have unlimited ability to continually improve in all areas however the ability is limited by time and resources. The adopted program strategy to ensure that time and resources are allocated appropriately to CQI areas was to develop an ongoing and dynamic priorities list of no more than ten (10) focus areas. The list is established in order of priority such that if there is a conflict in prioritizing two areas, the area higher on the priority list will receive the available time and resources. The order of importance of the top 10 priorities list changes over time. As one program area is sufficiently improved to a predetermined standard, it may be lowered or removed from the list to allow for the remaining areas to be re-evaluated in priority. An example of this would be when CWES is hosting an induction training class for new hires. Training is paramount and even more so when providing foundational training to future Employment and Training Workers. Thus, while the induction class is being prepared and throughout the course length, induction training remains high on the priority list. It is lowered, and removed, and the inductees complete their on-the-job-training and probationary periods and added back or escalated on the list when new hires are again needed.

CWES has found that continued practice of CQI on an established and dynamic priority list has been an efficient and effective practice.

4. An overview of the CWD's organizational vision and mission (optional).

CWES's mission is meeting family goals through employment, training, and education using resourceful teamwork and effective community partnerships.

CWES staff worked together in developing a motto of "Building Better Futures" and that motto is supported by a mantra of "Leaving No Stone Unturned". The mission, motto, and mantra support our collective values of:

- 1) Leadership that demonstrates vision, knowledge, dedication, competence, compassion and results.
- 2) Self-sufficiency as a measurement of our community's economic and social health.
- 3) Quality services that are delivered with integrity and innovation and that respect cultural diversity.
- 4) Full participation by persons we serve in making decisions that affect their lives.
- 5) Lifelong learning and the development of job skills.
- 6) Internal and external client and customer satisfaction as one of the most important measures of our success.

## Peer Review

**Peer County 1:**

Humboldt

1. Discuss how the Peer Review process impact Cal-SIP development.

The peer review process positively impacted CWES's Cal-SIP Development. CWES sought peer support through enrollment in a three (3) day UC Davis course taught by Kim Adams aimed at the Fundamentals of developing the Cal-OAR CSA. Humboldt County was invited and joined the County of Monterey Cal-OAR team to discuss the efforts and challenges each county had faced in the CQI process. Humboldt County shared the effective ways in which their new Program Manager was opening communication and welcoming feedback from all program staff. They shared the labor market resources that helped informed their assessment and areas of focus they initially thought may be unique to their County however helped the County of Monterey to refine our own focus areas.

2. Discuss steps taken to conduct peer review.

The peer review process was broken down into Cal-CSA component areas that were shared and reviewed each day of the training. Each section of the CSA was covered and discussed and both Counties were asked to share their progress, experiences, and challenges. Input was offered by the instructor and County collaborators to help inform, refine, and in some cases rework areas of the CSA. At the completion of the course and collaboration, both Counties had a better understanding of their progress on their respective CSA's and how that would inform the Cal-SIP.

3. Briefly summarize observations and action items from Peer Review process.

The action items from the peer review process were to focus on those Cal-OAR metrics that were the outliers when compared to State averages. Namely, the Sanction Rate, Sanction Resolution Rate, and the Orientation Attendance Rate.

## Goal Summary

<b>Goal 1</b>	Decrease Sanction Rate to 28% from 32%.
	Review using Cal-OAR Phase 1 reporting and County ad hoc reporting improving by 1.0% every 6 months within 2 years (for a total of a 4.0% improvement).
<b>Strategy 1</b>	Designate CalWORKs Employment Services (CWES) staff to establish ongoing and focused sanction cure efforts.
<p>5 Action Steps:</p> <p>Action Step 1: Designate no fewer than four (4) CalWORKs Employment Services (CWES) Case Managers (CCMs) to be responsible for monthly engagement of families that are in a Welfare-to-Work sanctioned program status for over three (3) months but less than one (1) year.</p> <p>Action Step 2: Designate a minimum of one (1) CalWORKs Employment Services (CWES) Supervisor to be responsible for monthly Caseload Management Detail Report (CMDR) reviews of families that are in a Welfare-to-Work sanction program status for over three (3) months but less than one (1) year.</p> <p>Action Step 3: Designate a CalWORKs Employment Services (CWES) Analyst responsible for monthly tracking and reporting of families in a Welfare-to-Work sanctioned program status that have been engaged by CWES Case Managers (CCMs) and whether each sanction family was able to begin participating in CWES program services.</p> <p>Action Step 4: Designate a minimum of one (1) CalWORKs Employment Services (CWES) Office Assistant to pull and review a monthly report identifying families in a Welfare-to-Work sanctioned program status for longer than three (3) months as well as those families in a sanction program status for under one (1) year.</p> <p>Action Step 5: Designate a CalWORKs Employment Services (CWES) Quality Assurance and Quality Control (QA/QC) staff member to conduct monthly focused case reviews on the engagement efforts of the CCMs identified in Action Step 1.</p>	
<b>Strategy 2</b>	Develop, distribute, and report on a monthly survey to CalWORKs Employment Services (CWES) families in a Welfare-to-Work sanction program status.
<p>5 Action Steps:</p> <p>Action Step 1: Task the CalWORKs Employment Services (CWES) Analyst in Strategy 1, Action Step 3 to develop a printable electronic survey made available to families that are in a Welfare-to-Work sanctioned program status less than three (3) months or greater than one (1) year.</p> <p>Action Step 2: Develop no fewer than ten (10) survey questions (English and Spanish versions) aimed at determining key reasons each family are unable to participate in WTW program services, the most significant barriers each family are facing, and the program services that each family believes would be most helpful to support them to regularly participate in WTW program activities and services.</p> <p>Action Step 3: Distribute/provide the sanction survey monthly to each family electronically, by mail, or over the</p>	

phone, and collect all responses electronically in a database (recommending Microsoft Forms).  
 Action Step 4: Schedule a monthly Sanction Team meeting to include all designees in strategy #1 and the program manager.  
 Action Step 5: Report the results of each monthly survey at the monthly meeting in action step #4 to each designated CalWORKs Employment Services (CWES) staff member identified in Strategy 1 as well as the CWES Program Manager monthly.

Strategy 3	Develop appropriate monolingual Spanish language electronic learning (E-learning) activities aimed to support agricultural families to meet their self-sufficiency goals and participation requirements during the off-season.
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4 Action Steps:  
 Action Step 1: Designate the CalWORKs Employment Services (CWES) E-Learning analyst to identify e-learning courses to be offered to monolingual Spanish speaking agricultural families.  
 Action Step 2: Ensure sufficient courses are identified to support between 87 and 152 monthly hours of participation for no fewer than three (3) off-season agricultural months.  
 Action Step 3: Develop a flyer that lists each course, the hours required to complete it, the study hours, and incentives available and ensure the flyer is distributed to all monolingual Spanish speaking families who are meeting program participation requirements through employment in seasonal agriculture.  
 Action Step 4: Develop a report that captures the number of monolingual Spanish speaking customers engaged in E-Learning courses and provide updates and trends during monthly CWES Leadership Team meetings.

<b>Goal 2</b>	Increase Sanction Resolution Rate to 8% from 6%
	Review using Cal-OAR Phase 1 reporting and County ad hoc reporting improving by 0.5% every 6 months within 2 years (for a total of a 2.0% improvement)

Strategy 1	Designate CalWORKs Employment Services (CWES) staff to establish ongoing and focused sanction cure efforts.
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5 Action Steps:  
 Action Step 1: Designate no fewer than four (4) CalWORKs Employment Services (CWES) Case Managers (CCMs) to be responsible for monthly engagement of families that are in a Welfare-to-Work sanctioned program status for over three (3) months but less than one (1) year.  
 Action Step 2: Designate a minimum of one (1) CalWORKs Employment Services (CWES) Supervisor to be responsible for monthly Caseload Management Detail Report (CMDR) reviews of families that are in a Welfare-to-Work sanction program status for over three (3) months but less than one (1) year.  
 Action Step 3: Designate a CalWORKs Employment Services (CWES) Analyst responsible for monthly tracking and reporting of families in a Welfare-to-Work sanctioned program status that have been engaged by CWES Case Managers (CCMs) and whether each sanction family was able to begin participating in CWES program services.  
 Action Step 4: Designate a minimum of one (1) CalWORKs Employment Services (CWES) Office Assistant to pull and review a monthly report identifying families in a Welfare-to-Work sanctioned program status for longer than three (3) months as well as those families in a sanction program status for over one (1) year.  
 Action Step 5: Designate a CalWORKs Employment Services (CWES) Quality Assurance and Quality Control (QA/QC)

<p>staff member to conduct monthly focused case reviews on the engagement efforts of the CCMs identified in Action Step 1.</p>	
Strategy 2	<p>Develop, distribute, and report on a monthly survey to CalWORKs Employment Services (CWES) families in a Welfare-to-Work sanction program status.</p>
<p>5 Action Steps:</p> <p>Action Step 1: Task the CalWORKs Employment Services (CWES) Analyst in Strategy 1, Action Step 3 to develop a printable electronic survey made available to families that are in a Welfare-to-Work sanctioned program status less than three (3) months or greater than one (1) year.</p> <p>Action Step 2: Develop no fewer than ten (10) survey questions (English and Spanish versions) aimed at determining key reasons each family are unable to participate in WTW program services, the most significant barriers each family are facing, and the program services that each family believes would be most helpful to support them to regularly participate in WTW program activities and services.</p> <p>Action Step 3: Distribute/provide the sanction survey monthly to each family electronically, by mail, or over the phone, and collect all responses electronically in a database (recommending Microsoft Forms).</p> <p>Action Step 4: Report the results of each monthly survey to each designated CalWORKs Employment Services (CWES) staff member identified in Strategy 1 as well as the CWES Program Manager monthly.</p> <p>Action Step 5: Ensure the survey includes an optional demographics section that may be completed by customers for the purpose of capturing equity in the survey responses. Add the survey demographics to the monthly reporting and identify any equity trends that are captured.</p>	
Strategy 3	<p>Intensive case management for families in Welfare-to-Work program status of non-compliance and status reason of curing WTW sanction.</p>
<p>5 Action Steps:</p> <p>Action Step 1: Families who express an interest in curing their sanction and sign a sanction cure plan are assigned to a CalWORKs Case Manager identified in strategy 1, action step 1.</p> <p>Action Step 2: Sanction cure CalWORKs Case Managers engage families participating in a sanction cure plan weekly to provide support, encouragement, incentives, address barriers, and to ensure sufficient progress is made toward goals and participation hours.</p> <p>Action Step 3: A minimum of three (3) contacts and one (1) home visit is made to engage non-participating families before taking negative action.</p> <p>Action Step 4: Develop a report that captures the number of Non-Compliant customers engaged in program activities and services and provide updates and trends during monthly CWES Leadership Team meetings.</p> <p>Action Step 5: Include as a component of the report in Action Step #4, a demographics breakdown of customers successfully engaged in program services and seek to identify any equity challenges or trends.</p>	
Goal 3	<p>Increase Orientation Attendance Rate to 41% from 37%</p>

	Review using Cal-OAR Phase 1 reporting and County ad hoc reporting increasing by 1.0% every 6 months within 2 years
Strategy 1	Increase efforts to schedule and successfully complete the Welfare-to-Work Orientation activity.
<p>4 Action Steps:</p> <p>Action Step 1: Require a minimum of three (3) contacts and one (1) home visit attempt prior to placing a family in non-compliance for not attending their Welfare-to-Work orientation.</p> <p>Action Step 2: Include Orientation Attendance as a measure in the Electronic Quality Assurance process.</p> <p>Action Step 3: Add an ongoing agenda item to the monthly CWES Leadership Team agenda to receive a report from the Cal-OAR program analyst detailing the past, current, and projected Orientation Attendance Rates as well as to discuss those families that were not able to complete the activity timely and/or successfully.</p> <p>Action Step 4: Include as a component of the report in Action Step #3 a demographics breakdown of the families that were not able to successfully participate in the Orientation activity. Seek to identify any demographics trends that may point to equity challenges in the strategy.</p>	
Strategy 2	Determine any data entry errors that may negatively influence accurate recording of successful orientation attendance rate.
<p>3 Action Steps:</p> <p>Action Step 1: Assign a program analyst to provide a monthly report to all Employment &amp; Training Supervisors demonstrating Orientation activities that remain in a "referred" activity status reason beyond ten (10) days from the activity begin date.</p> <p>Action Step 2: Require Employment &amp; Training Supervisors to review the orientation activities in referred activity status report and ensure the activity status is updated appropriately.</p> <p>Action Step 3: Designate a CalWORKs Employment Services (CWES) Analyst responsible for monthly tracking and reporting of families in a Welfare-to-Work Orientation activity and the corresponding activity status and status reason as well as the overall timeliness of completion and reasons for not completing the activity successfully.</p>	
Strategy 3	Intensive case management for families in Welfare-to-Work program status of non-compliance or sanction and status reason of "no show" to WTW orientation or appraisal activity.
<p>5 Action Steps:</p> <p>Action Step 1: Families in the identified program statuses and status reasons are assigned to a CalWORKs Case Manager identified in Goal 2, strategy 1, action step 1.</p> <p>Action Step 2: Sanction cure CalWORKs Case Managers engage families participating in a sanction cure plan weekly to provide support, encouragement, incentives, address barriers, and to ensure sufficient progress is made toward goals and participation hours.</p> <p>Action Step 3: A minimum of three (3) contacts and one (1) home visit is made to engage non-participating families before taking negative action.</p> <p>Action Step 4: Develop a report that captures the number of Non-Compliant customers engaged in program activities and services and provide updates and trends during monthly CWES Leadership Team meetings.</p> <p>Action Step 5: As a component of the report in Action Step #4, include a demographics breakdown of those</p>	

customers who were successfully engaged as well as for those customers who were not engaged. Seek to identify demographics trends that may point to equity challenges in the strategy and goal.

## Measure-level Descriptions

### 1. Describe the reason for selecting the measure or programmatic grouping of measures.

The County of Monterey (MC) Department of Social Services (DSS) CalWORKs Employment Services (CWES) identified the (1) Sanction Rate, (2) Sanction Resolution Rate, and (3) Orientation Attendance Rate as the Cal-OAR measure areas of improvement. MC DSS CWES program generally had lower performance averages in these three Cal-OAR metrics in comparison to State Cal-OAR averages in the same metrics over the reporting period.

The MC DSS CWES program used the three (3) under performing Cal-OAR metrics and the County Self-Assessment process to develop and distribute a survey to families in the Welfare-to-Work (WTW) program that had received a WTW sanction program status. Nearly 20% of these families responded to the survey detailing the reasons for their WTW sanction, their program needs, and their desires to participate in program services. Additionally, the County Self-Assessment process revealed that nearly half of the Welfare-to-Work sanctions occur due to non-compliance in upfront program activities to include Orientation Attendance which is the third Cal-OAR metric selected for improvement.

While conducting disaggregated data analysis for the Cal-OAR focus measures it was revealed that monolingual Spanish speaking families working in agriculture and specifically families in the South (rural) areas of the County were disproportionately represented in rates of sanctions and resolutions. Surveys from these families revealed a desire for short-term educational program activities that can be completed from home.

### 2. Do partners and collaborators agree this is a measure or programmatic grouping of measures that should be focused on at this time?

Throughout the County Self-Assessment, contracted County partners have shared the need for increased enrollments and participation in their contracted program services. Education, Employment, and Barrier Removal partners have experienced a significant decrease in enrollments since the COVID-19 pandemic. Although program enrollments have been improving with the increase of enrolled families, there remain nearly 350 families in a WTW sanction program status. Survey results from these families indicate that at least 20% of them are interested in participating in internal and contracted program services to include: employment (30%), subsidized employment (24%), job search assistance (36%), education (36%), mental health services (33%), parenting classes (28%), legal and credit repair services (20%), and housing services (35%). County contracted partners and service providers are supportive of the identified County Self-Improvement efforts.

### 3. Describe any anticipated interactions with other measures.

MC DSS CWES anticipates that decreasing the Sanction Rate and increasing both the Sanction Resolution Rate and the Orientation Attendance Rate will have positive interactions with the (1) Employment Rate, (2) First Activity Attendance Rate, (3) Education Skills and Development Utilization, (4) Education and Skills Access, and (5) Homeless Assistance and Housing Support Program Access. CWES will also closely monitor the remaining Cal-OAR measures for any unanticipated negative interactions resulting from the focus on families in a WTW sanction program status.

4. Describe how the CWD will track performance measure improvement.

MC DSS CWES tracks performance measure improvement using the Cal-OAR data dashboard and internal ad hoc reports containing detailed information on families in a WTW sanction program status as well as families enrolled in the Orientation activity and the activity status. Self-Improvement Plan progress is reviewed as a key program goal and agenda item at monthly Leadership Team meetings with CWES analysts and supervisors. Available data is reviewed and discussed at these meetings in addition to review of each Cal-SIP goal, strategy, and action steps.

Additionally, all Cal-OAR measures are included to the CWES Electronic Quality Assurance (EQA) program to allow for a focused review of individual cases and their impact on the identified self-improvement measures and the anticipated and unanticipated interactions with other Cal-OAR measures.

## Goal-level Descriptions

### Goal 1

**Decrease Sanction Rate to 28% from 32%.**

**Review using Cal-OAR Phase 1 reporting and County ad hoc reporting improving by 1.0% every 6 months within 2 years (for a total of a 4.0% improvement).**

**Strategy 1      Designate CalWORKs Employment Services (CWES) staff to establish ongoing and focused sanction cure efforts.**

**Strategy 2      Develop, distribute, and report on a monthly survey to CalWORKs Employment Services (CWES) families in a Welfare-to-Work sanction program status.**

**Strategy 3      Develop appropriate monolingual Spanish language electronic learning (E-learning) activities aimed to support agricultural families to meet their self-sufficiency goals and participation requirements during the off-season.**

1. Explain the reasoning or methodology which was used to determine this goal.

MC DSS CWES identified the most significant outlier Cal-OAR metric was the County's Welfare-to-Work program Sanction Rate when compared to State averages. Monthly Phase 1 Cal-OAR measurement reports consistently identified engagement of sanctioned families as the primary area of opportunity for a Cal-OAR goal and strategies.

The County's self-assessment effort to survey Welfare-to-Work families in a sanctioned program status revealed that 42% of families had not recalled being contacted to cure their WTW sanction while 62% of the families surveyed expressed an interest in reconnecting with program services and 56% expressed a desire to cure their WTW sanction. Through the survey, over 30% of the families expressed that the vast array of WTW programs and

supportive services were desirable. Less than half (44%) of the families surveyed indicated no immediate preference for curing their WTW sanction citing comfort (10%), uncertainty (24%), trust (6%), and doubt (4%) as their obstacles to program participation. The aggregate survey responses revealed that clear, continuous, and concentrated efforts to engage families in a WTW program sanction status could result in connecting these families with the programs and services needed to help them achieve self-sufficiency and would lead to a reduction in the County's Cal-OAR Sanction Rate.

Members of the County's cross-functional Cal-OAR team shared the past successful efforts of establishing a CWES Sanction Cure pilot program in 2016 and 2017. The program consisted of designating CWES Case Managers, Supervisors, and an analyst to focus on engagement of families in a WTW sanction program status. The pilot successfully connected families to program services with only a 20% return to sanction rate. The proof of concept of the CWES Sanction Cure pilot provided additional confidence in CWES's ability to effectively improve the Sanction Rate Cal-OAR metric.

Through monthly collaborative meetings, County contracted service providers and partners expressed their interest and support for CWES to work to engage families in a WTW sanction program status.

## 2. What led the CWD to these improvement strategies?

Strategy 1 - The past successful efforts of a 2016-2017 sanction cure pilot team lead to the strategy to designate CWES program staff to establish ongoing ad focused sanction cure efforts. The cross-functional Cal-OAR team expressed a strong desire to return to these efforts in order to address the Cal-OAR Sanction Rate outlier metric.

Strategy 2 - The successful development and distribution of the County Self-Assessment survey to families in a WTW sanction program status led to the strategy of developing, distributing, and reporting on a monthly survey for families in a WTW sanction program status. The survey provided a communication avenue between families that were not participating in WTW programs services and the CWD. It allowed for families to share their needs, barriers, and concerns and for them to receive information about the benefits of participating and to request to be reconnected with services.

Strategy 3 - De-aggregated demographics data revealed that strategies 1 and 2 alone would not address families working seasonally in agriculture. These families are primarily located in rural areas in South Monterey County and tend to be monolingual Spanish language speaking. A strategy to develop appropriate mono-lingual Spanish language electronic learning (E-learning) activities aimed to support agricultural families to meet their self-sufficiency goals and participation requirements during the off-season was needed to support families facing only seasonal program participation challenges.

## 3. Discuss any research or literature that supports the strategies chosen. Cite reference.

The State of California's Written Update to the Legislature on AB 1808 County Plan Addendum Strategies for Increasing the Work Participation Rate (July 2008) recommended several specific Sanction Reengagement Strategies.

Recommended strategy # 1 included home visits or offsite meetings. This strategy identified that making home visits to sanctioned families alone helped reduce sanction rates in other counties between 20% and 50%. To this end, home visits are identified as a strategy in Goal #2, strategy #3, action step #3.

Recommended strategy #2 included intensive outreach. This strategy identified that several phone calls and information letters helped reduce other county's sanction rates. To this end, Goal #1, strategy #2 is implemented to provide monthly information and gain monthly feedback from families in a WTW sanction program status.

Recommended strategy #3 included specialized unit caseworkers. This strategy identified that counties that designated caseworkers to specifically engage families in a WTW sanction program status experienced between a 12.8% and 25% reduction in their sanction rate. To this end, Goal #1, strategy #1 is implemented.

#### 4. Describe the roles of other partners and collaborators in implementing the strategies.

The cross-functional CWES Cal-OAR team and monthly meetings with contracted service providers and partners was instrumental in strategy development and will continue to be instrumental in implementation. Gathering survey responses from families in a Welfare to Work sanction program status was additionally insightful and imperative to developing the strategies. The UC Davis training and review of the County Self-Assessment as well as the collaboration with Humboldt County helped to focus on which strategies could be successfully implemented and which of those would likely yield the most effective outcomes.

#### 5. Identify any staff education and training needs, and include any technical assistance needed to implement strategy and achieve goal.

CalWORKs Employment Services Employment & Training workers, Supervisors, and supporting clerical and management staff will require training on the process and procedures for supporting the families with a Welfare to Work sanction program status. Ongoing annual Motivational Interviewing (MI) and Racial Equity and Implicit Bias (REIB) training will be helpful to ensure staff are familiar with these techniques and initiatives and will lead to greater success in strategy implementation.

#### 6. Describe how the CWD plans to mitigate and/or address both known internal and external barriers [to achieve the goal]

During a SWOT analysis, it was identified that the most significant resource barrier is available Employment & Training Worker staffing. As this Self-Improvement Plan is being developed, Monterey County CalWORKs Employment Services twenty-two (22) available Employment & Training Workers are currently supporting between 65 and 70 cases and caseloads have been rising consistently for over a year. Supporting a minimum of four (4) designated workers to engage approximately 350 families in a Welfare to Work sanction program status, would require a reassignment of their current caseload between 260 and 280 ongoing active cases to the eighteen (18) remaining workers increasing their caseloads to between 80 and 85.

The plan for mitigating this impact is to request to fill an additional four (4) Employment & Training worker positions to offset the impact of establishing the Sanction Cure unit. These positions are currently budgeted for, and the recruitment process has already begun. Monterey County CalWORKs Employment Services anticipates having these four (4) positions filled in April 2024. Following eight (8) months of induction training, it is estimated that these four (4) positions will be at full caseload availability by December 2024.

Attrition was identified in the SWOT analysis and accounted for as well. Monterey County CalWORKs Employment Services is able to temporarily reassign lead workers from the Job Search Workshop and Quality Assurance teams for periods of ninety (90) days. Through these temporary reassignments, CWES is able to balance a full caseload for a period of up-to 180 days to support recruiting behind a vacated E&T position.

7. Describe how your facility will continuously evaluate each action step taken to see if improvement is being achieved.  
(e.g., tracking tools, meetings, monitoring, etc) Include who will be responsible for follow up and compliance.

The analyst designated in strategy 1, action step 3 will be responsible for ongoing data collection and reporting to the sanction cure unit team and program manager. Monthly program reporting that was developed in the pilot in 2017 remains available to be reinstated. CWES has access to a robust and thorough CalSAWS universe report referred to as the "Provider's List Report". This report has been in use for several years and staff are familiar with the data fields and use of pivot tables to quickly extract information on families in a Welfare to Work sanction program status as well as those placed in a sanction cure plan. Progress will be measured monthly to ensure the desired improvement is taking place in the Sanction Cure Rate Cal-OAR metric.

**Goal 2**

**Increase Sanction Resolution Rate to 8% from 6%**

**Review using Cal-OAR Phase 1 reporting and County ad hoc reporting improving by 0.5% every 6 months within 2 years (for a total of a 2.0% improvement)**

**Strategy 1      Designate CalWORKs Employment Services (CWES) staff to establish ongoing and focused sanction cure efforts.**

**Strategy 2      Develop, distribute, and report on a monthly survey to CalWORKs Employment Services (CWES) families in a Welfare-to-Work sanction program status.**

**Strategy 3      Intensive case management for families in Welfare-to-Work program status of non-compliance and status reason of curing WTW sanction.**

## 1. Explain the reasoning or methodology which was used to determine this goal.

MC DSS CWES identified the 2nd most significant outlier Cal-OAR metric was the County's Welfare-to-Work program Sanction Cure Rate when compared to State averages. Monthly Phase 1 Cal-OAR measurement reports consistently identified the cure rate of sanctioned families as the secondary area of opportunity for a Cal-OAR goal and strategies.

The County's self-assessment effort to survey Welfare-to-Work families in a sanctioned program status revealed that 42% of families had not recalled being contacted to cure their WTW sanction while 62% of the families surveyed expressed an interest in reconnecting with program services and 56% expressed a desire to cure their WTW sanction. Through the survey, over 30% of the families expressed that the vast array of WTW programs and supportive services were desirable. Less than half (44%) of the families surveyed indicated no immediate preference for curing their WTW sanction citing comfort (10%), uncertainty (24%), trust (6%), and doubt (4%) as their obstacles to program participation. The aggregate survey responses revealed that clear, continuous, and concentrated efforts to engage families in a WTW program sanction status could result in connecting these families with the programs and services needed to help them achieve self-sufficiency and would lead to a reduction in the County's Cal-OAR Sanction Rate.

Members of the County's cross-functional Cal-OAR team shared the past successful efforts of establishing a CWES Sanction Cure pilot program in 2016 and 2017. The program consisted of designating CWES Case Managers, Supervisors, and an analyst to focus on engagement of families in a WTW sanction program status. The pilot successfully connected families to program services with only a 20% return to sanction rate. The proof of concept of the CWES Sanction Cure pilot provided additional confidence in CWES's ability to effectively improve the Sanction Cure Rate Cal-OAR metric.

Through monthly collaborative meetings, County contracted service providers and partners expressed their interest and support for CWES to work to engage families in a WTW sanction program status.

## 2. What led the CWD to these improvement strategies?

Strategy 1 - The past successful efforts of a 2016-2017 sanction cure pilot team lead to the strategy to designate CWES program staff to establish ongoing ad focused sanction cure efforts. The cross-functional Cal-OAR team expressed a strong desire to return to these efforts in order to address the Cal-OAR Sanction Cure Rate outlier metric.

Strategy 2 - The successful development and distribution of the County Self-Assessment survey to families in a WTW sanction program status led to the strategy of developing, distributing, and reporting on a monthly survey for families in a WTW sanction program status. The survey provided a communication avenue between families that were not participating in WTW programs services and the CWD. It allowed for families to share their needs, barriers, and concerns and for them to receive information about the benefits of participating and to request to be reconnected with services.

Strategy 3 - The successful engagement and barrier removal efforts in the Family Stabilization program led to the strategy of intensive case management for families in Welfare-to-Work program status of non-compliance and status reason of curing WTW sanction.

3. Discuss any research or literature that supports the strategies chosen. Cite reference.

The State of California's Written Update to the Legislature on AB 1808 County Plan Addendum Strategies for Increasing the Work Participation Rate (July 2008) recommended several specific Sanction Reengagement Strategies.

Recommended strategy # 1 included home visits or offsite meetings. This strategy identified that making home visits to sanctioned families alone helped reduce sanction rates in other counties between 20% and 50%. To this end, home visits are identified as a strategy in Goal #2, strategy #3, action step #3.

Recommended strategy #2 included intensive outreach. This strategy identified that several phone calls and information letters helped reduce other county's sanction rates. To this end, Goal #1, strategy #2 is implemented to provide monthly information and gain monthly feedback from families in a WTW sanction program status.

Recommended strategy #3 included specialized unit caseworkers. This strategy identified that counties that designated caseworkers to specifically engage families in a WTW sanction program status experienced between a 12.8% and 25% reduction in their sanction rate. To this end, Goal #1, strategy #1 is implemented.

4. Describe the roles of other partners and collaborators in implementing the strategies.

The cross-functional CWES Cal-OAR team and monthly meetings with contracted service providers and partners was instrumental in strategy development and will continue to be instrumental in implementation. Gathering survey responses from families in a Welfare to Work sanction program status was additionally insightful and imperative to developing the strategies. The UC Davis training and review of the County Self-Assessment as well as the collaboration with Humboldt County helped to focus on which strategies could be successfully implemented and which of those would likely yield the most effective outcomes.

5. Identify any staff education and training needs, and include any technical assistance needed to implement strategy and achieve goal.

CalWORKs Employment Services Employment & Training workers, Supervisors, and supporting clerical and management staff will require training on the process and procedures for supporting the families with a Welfare to Work sanction program status. Ongoing annual Motivational Interviewing (MI) and Racial Equity and Implicit Bias (REIB) training will be helpful to ensure staff are familiar with these techniques and initiatives and will lead to greater success in strategy implementation.

6. Describe how the CWD plans to mitigate and/or address both known internal and external barriers [to achieve the goal]

During a SWOT analysis, it was identified that the most significant resource barrier is available Employment & Training Worker staffing. As this Self-Improvement Plan is being developed, Monterey County CalWORKs Employment Services twenty-two (22) available Employment & Training Workers are currently supporting between 65 and 70 cases and caseloads have been rising consistently for over a year. Supporting a minimum of four (4) designated workers to engage approximately 350 families in a Welfare to Work sanction program status, would require a reassignment of their current caseload between 260 and 280 ongoing active cases to the eighteen (18) remaining workers increasing their caseloads to between 80 and 85.

The plan for mitigating this impact is to request to fill an additional four (4) Employment & Training worker positions to offset the impact of establishing the Sanction Cure unit. These positions are currently budgeted for, and the recruitment process has already begun. Monterey County CalWORKs Employment Services anticipates having these four (4) positions filled in April 2024. Following eight (8) months of induction training, it is estimated that these four (4) positions will be at full caseload availability by December 2024.

Attrition was identified in the SWOT analysis and accounted for as well. Monterey County CalWORKs Employment Services is able to temporarily reassign lead workers from the Job Search Workshop and Quality Assurance teams for periods of ninety (90) days. Through these temporary reassignments, CWES is able to balance a full caseload for a period of up-to 180 days to support recruiting behind a vacated E&T position.

7. Describe how your facility will continuously evaluate each action step taken to see if improvement is being achieved.  
(e.g., tracking tools, meetings, monitoring, etc) Include who will be responsible for follow up and compliance.

The analyst designated in Goal 1, strategy 1, action step 3 will be responsible for ongoing data collection and reporting to the sanction cure unit team and program manager. Monthly program reporting that was developed in the pilot in 2017 remains available to be reinstated. CWES has access to a robust and thorough CalSAWS universe report referred to as the "Provider's List Report". This report has been in use for several years and staff are familiar with the data fields and use of pivot tables to quickly extract information on families in a Welfare to Work sanction program status as well as those placed in a sanction cure plan. Progress will be measured monthly to ensure the desired improvement is taking place in the Sanction Cure Rate Cal-OAR metric.

### Goal 3

**Increase Orientation Attendance Rate to 41% from 37%**

**Review using Cal-OAR Phase 1 reporting and County ad hoc reporting increasing by 1.0% every 6 months within 2 years**

**Strategy 1      Increase efforts to schedule and successfully complete the Welfare-to-Work Orientation activity.**

**Strategy 2      Determine any data entry errors that may negatively influence accurate recording of successful orientation attendance rate.**

**Strategy 3      Intensive case management for families in Welfare-to-Work program status of non-compliance or sanction and status reason of "no show" to WTW orientation or appraisal activity.**

1. Explain the reasoning or methodology which was used to determine this goal.

MC DSS CWES identified the 3rd most significant outlier Cal-OAR metric was the County's Welfare-to-Work program Orientation Attendance Rate when compared to State averages. Monthly Phase 1 Cal-OAR measurement reports consistently identified the orientation attendance rate as the third area of opportunity for a Cal-OAR goal and strategies. In all other Cal-OAR measures, Monterey County matched or exceeded statewide performance averages.

Monterey County discovered fluctuations in this metric month over month such that the team determined it would be important to put strategies in place to ensure accuracy in documenting orientation attendance properly in

CalSAWS.

It is estimated that between 30% and 40% of families do not successfully complete their Welfare-to-Work program orientation. Many of these families may end up in a Welfare-to-Work sanctioned program status. It followed that strategies to prevent this outcome would improve not only the Orientation Attendance Rate but also the Sanction Rate and Sanction Resolution Rate as well.

## 2. What led the CWD to these improvement strategies?

Strategy #1 - To increase efforts to schedule and successfully complete the Welfare-to-Work Orientation activity resulted from input from the cross-functional team when discussing the Orientation Attendance Rate metric fluctuations. The team agreed that more effort in engaging and tracking Welfare-to-Work families in upfront activities, especially Orientation Attendance, would lead to improvements in the metric and less fluctuation over time. The team suggested that CWES Case Managers could be more diligent in making several attempts and a home visit to engage customers. The team also recommended tracking this activity in Quality Assurance reviews and providing reports on the success of the efforts.

Strategy #2 - To determine any data entry errors that may negatively influence accurate recording of successful orientation attendance rate was introduced by the CWES Supervisor and Analysts on the Cal-OAR cross-functional team. The team identified that the Orientation Attendance Rate would fluctuate while the OCAT Completion Timeliness rate was consistently higher compared to State averages. The process and procedures for entering the Orientation and Appraisal activity in Cal-SAWS had been modified and raised concerns that data entry may also be a contributing factor to the fluctuating entries. A strategy was put forth to ensure that the program analyst and supervisors review the actives closely each month to resolve any negative contribution from data entry errors.

Strategy #3 - To provide intensive case management for families in Welfare-to-Work program status of non-compliance or sanction and status reason of "no show" to WTW orientation or appraisal activity was necessary to synergize the efforts of this goal with goals #1 and #2 above.

## 3. Discuss any research or literature that supports the strategies chosen. Cite reference.

The State of California's Written Update to the Legislature on AB 1808 County Plan Addendum Strategies for Increasing the Work Participation Rate (July 2008) recommended several specific Sanction Reengagement Strategies. These strategies when combined with Orientation Attendance Rate, continue to apply.

Recommended strategy # 1 included home visits or offsite meetings. This strategy identified that making home visits to sanctioned families alone helped reduce sanction rates in other counties between 20% and 50%. To this end, home visits are identified as a strategy in Goal #3, strategy #1, action step #1.

Recommended strategy #2 included intensive outreach. This strategy identified that several phone calls and information letters helped reduce other county's sanction rates. To this end, Goal #3, strategy #1 and #3 are implemented to provide increased contact opportunities, home visits, and intensive case management for families facing non-compliance or sanction from a "no show" to the Orientation activity.

Recommended strategy #3 included specialized unit caseworkers. This strategy identified that counties that

designated caseworks to specifically engage families in a WTW sanction program status experienced between a 12.8% and 25% reduction in their sanction rate. To this end, Goal #3, strategy #3 is implemented.

4. Describe the roles of other partners and collaborators in implementing the strategies.

Although this goal is specifically internal, CWES collaborated with the Department of Social Services Internet Technology and Systems Support teams to implement the necessary reports and electronic quality assurance enhancements. The EQA enhancement project is several months in and biweekly meetings are held to ensure the new EQA system and reports will be ready in early 2024.

5. Identify any staff education and training needs, and include any technical assistance needed to implement strategy and achieve goal.

A thorough review of process and procedure for scheduling the Orientation activity will have to be conducted and the program analyst will have to make modifications as needed and provide staff training once those modifications have been made.

6. Describe how the CWD plans to mitigate and/or address both known internal and external barriers [to achieve the goal]

During a SWOT analysis, it was identified that the most significant resource barrier is available Employment & Training Worker staffing. As this Self-Improvement Plan is being developed, Monterey County CalWORKs Employment Services twenty-two (22) available Employment & Training Workers are currently supporting between 65 and 70 cases and caseloads have been rising consistently for over a year. Supporting a minimum of four (4) designated workers to engage approximately 350 families in a Welfare to Work sanction program status, including those in non-compliance due to a "no show" in the Orientation activity status reason, would require a reassignment of their current caseload between 260 and 280 ongoing active cases to the eighteen (18) remaining workers increasing their caseloads to between 80 and 85.

The plan for mitigating this impact is to request to fill an additional four (4) Employment & Training worker positions to offset the impact of establishing the Sanction Cure unit. These positions are currently budgeted for, and the recruitment process has already begun. Monterey County CalWORKs Employment Services anticipates having these four (4) positions filled in April 2024. Following eight (8) months of induction training, it is estimated that these four (4) positions will be at full caseload availability by December 2024.

Attrition was identified in the SWOT analysis and accounted for as well. Monterey County CalWORKs Employment Services is able to temporarily reassign lead workers from the Job Search Workshop and Quality Assurance teams for periods of ninety (90) days. Through these temporary reassignments, CWES is able to balance a full caseload for a period of up-to 180 days to support recruiting behind a vacated E&T position.

7. Describe how your facility will continuously evaluate each action step taken to see if improvement is being achieved.  
(e.g., tracking tools, meetings, monitoring, etc.) Include who will be responsible for follow up and compliance.

The analyst designated in Goal 3, strategy 1, action step 3 and strategy 2, action steps 1 and 3 will be responsible for ongoing data collection and reporting to the leadership team and program manager. CWES has access to a robust and thorough CalSAWS universe report referred to as the "Provider's List Report". This report has been in use for several years and staff are familiar with the data fields and use of pivot tables to quickly extract information on families in a Welfare to Work orientation program activity as well as those with an activity status reason of "now show". Progress will be measured monthly to ensure the desired improvement is taking place in the Orientation Attendance Rate Cal-OAR metric.

## Appendix B: Cal-OAR Team and Partners and Collaborators

Below serves as a template to be included as Appendix B in the Cal-OAR Cal-CSA and Cal- SIP reports. Additional information can be found in [ACL 19-108](#) and the [Partner and Collaborator Engagement Toolkit](#) on our Cal-OAR website. This also includes analysis tools, budgeting and planning tools, engagement tools, and overcoming obstacles tools in engaging your partners and collaborators.

### LIST OF PARTNERS AND COLLABORATORS AND THEIR ROLE IN ENGAGEMENT

The CWD shall list the Cal-OAR team members and partner and collaborators, affiliation, and a brief description of their participation in the Cal-CSA and Cal-SIP reports. This is the team that worked collaboratively throughout the CQI cycle.

County Cal-OAR Team Members	Title	Level of Participation/ Description
Example: Team Member 1	Program Specialist	Cal-OAR lead; facilitation; lead report author
Debra McAlahney	Senior Analyst	Lead Contributor, CSA Author
Judy Perez	Analyst	Cross Functional Meeting Facilitator
Anna Solis	Employment & Training Supervisor	Cross Functional Team Leader
Norman Mathews	Employment & Training Worker III	Cross Functional Team Member
Lucy Campos	Lead Office Assistant	Cross Functional Team Member
Marleen Bush	Analyst	Research Assistant and Data Organizer
Nancy Perez	Office Assistant	Sanction Survey Distribution/Tracking

Other staff, group, local/relevant partners, and/or consultation	Affiliation/Organization	Level of Participation/ Description
Example: County Staff Member #1	County Happy Place	Supported in the collection of various types of program data
Example: Community Based Organization member #1	CBO #1	Provided feedback on referral processes that are and are not working.
ESE Coordination	Goodwill Central Coast	Monthly Coordination and CSA Feedback
Mental Health Services	Behavioral Health Access Team	Monthly Coordination and CSA Feedback
Housing Services	Housing Resource Center of Monterey County	Monthly Coordination and CSA Feedback
Legal Services	Watsonville Law Center	Quarterly Coordination and CSA Feedback
Learning Disability Services	Learning Time Inc.	Quarterly Coordination and CSA Feedback
Early Childhood Development	First 5 of Monterey County	Quarterly Coordination and CSA Feedback
Workforce Innovation & Opportunity ACT	Workforce Development Board	Conference Meeting for Referrals
Job Search Workshop Team	MCDSS CWES Staff	Monthly Coordination and CSA Feedback
Community Service Coordinator	United Way of Monterey County	Quarterly Coordination and CSA Feedback
Parenting Classes Coordinator	Mr. Eduardo Eizner	Program Needs Discussion

Required Partners and Collaborators	Affiliation/Organization	Level of Participation/Description
Sanction Cure Unit	MCDSS CWES Supervisors & E&T's	Operate the Sanction Cure Unit
CWES Cal-OAR Analyst	MCDSS CWES Analyst	Develop Sanction Survey and Reports
CWES Job Search Analyst	MCDSS CWES Analyst	Identify and Implement Monolingual E-Learning Solutions and Report
CWES Clerical/Reception Team	MCDSS CWES Clerical Supervisor and Office Assistants	Distributing and Collecting Sanction Surveys and Assigning Cases
CWES Clients/Customers	CalWORKs WTW Recipients	Participate in Surveys and Services

**\*Includes county staff that are not a part of your county's Cal-OAR team but were involved in the partner and collaborator phase.**

INDICATE WHETHER ALL THE REQUIRED PARTICIPANTS WERE INVOLVED IN THE REPORT DEVELOPMENT.

<p>Did all the required local partners and collaborators participate in the development of the Cal-CSA and Cal-SIP?</p> <p>(This includes county CalWORKs administrators, supervisors, caseworkers, current and former CalWORKs clients, and county human services agency partners.)</p>	<p>Yes/No; if No, please explain the circumstances as to why the required partners were not able to participate.</p>
<p>Yes</p>	<p>(If No, please explain)</p>

*The Appendix can be used to capture additional detailed information not already captured in the Cal-CSA report.*