

## Cal-OAR Cal-SIP Report

**Form Instructions**

Please read instructions thoroughly and completely prior to beginning form

These instructions are tips for navigating this excel document. They are not a replacement for the detailed instructions on how to answer questions in the Cal-SIP.

The entire form can be navigated by pressing tab to see where data entry is required. You can advance to the next tab by clicking on the tab or pressing ctrl + page down on your keyboard.

**Counties to fill out this form in the following order: left to right, top to bottom. Not filling out the form in this order will undermine the data transfers built in between specific sections.**

We suggest typing narrative responses in another program (such as Microsoft Word) and pasting your response into the formula bar. If the text is cut off you are able to resize the row (but will not be able to delete or move it). You can use alt + enter to insert line breaks into a single cell for cleaner formatting, but this is not required.

**Do not cut and paste from one cell to another in this form. It will make the initial cell that you cut from unusable.**

**Do not save this form as any extension except xlsx to keep macros intact. If the form is saved otherwise the macros are permanently deleted and you must use a fresh copy of the form. You can test if macros are disabled by clicking the next page button below.**

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<b>County Contact Information</b>	
County	San Diego
Cohort	2
Contact Name	Patty Baker
Contact Email	Patty.Baker@sdcounty.ca.gov
Contact Phone Number	(619) 338-2321
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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.

To develop the Cal-SIP report, the San Diego County Health and Human Services Agency (HHSA) utilized a team of CalWORKs and Employment Services Program staff in partnership with Employment Services (Welfare-to-Work) service providers, Eligibility staff and peer review meetings with Tulare County staff to target performance measures for the 2021-2026 Cal-OAR cycle. The Cal-SIP report was written by a centralized team under the guidance of the CalWORKs/Employment Services Program Manager.

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

San Diego County HHSA is continually seeking to improve service delivery to all customers. Switching from a case based to a task based case management model for ongoing eligibility, contracting out the administration of the Employment Services (Welfare-To-Work) program, and establishing a customer call center to address a high volume of internal and external customer calls are a few examples of past system improvement efforts. Recent efforts include the adoption of a Qmatic System at the Family Resource Centers (CalWORKs Offices) to manage lobby traffic and implementing the use of virtual appointments as well as telephonic signatures for CalWORKs customers.

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

Moving CalWORKs case management to a task-based system handled by County staff while maintaining Employment Services (WTW) cases with individual, contracted case managers has proven largely beneficial. Employment Services contractors were procured based on their ability to provide services to CalWORKs customers in an effective, trauma-informed manner. Dividing this workload has enabled eligibility staff to concentrate on establishing eligibility within regulatory timeframes, processing periodic reports and annual renewals while regionalized WTW service providers focus on assessing the needs of their customers, including barrier removal services, issuing needed supportive services payments, developing appropriate WTW Plans, and monitoring monthly progress of customers in assigned WTW activities. While service delivery and customer service benefited from this division of tasks, the knowledge base of eligibility staff regarding the WTW program has been impacted. As part of Cal-SIP efforts to improve First Activity Participation Rate outcomes, San Diego will seek to increase the WTW program knowledge base of eligibility staff so they can serve as trusted messengers and promote the extensive benefits of the WTW program.

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

The County of San Diego HHSA's organizational vision is for a region that is building better health, living safely, and thriving to advance a just, sustainable, and resilient future for all. The HHSA mission is to make people's lives healthier, safer, and self-sufficient by delivering essential services in San Diego County.

<b>Peer Review</b>		
Select up to three Peer Counties		
Peer County 1: Tulare	Peer County 2: Select County	Peer County 3: Select County
<b>1. Discuss how the Peer Review process impact Cal-SIP development.</b>		
<p>The peer review process with Tulare County staff was a positive experience for San Diego County HHSA. Despite differences in case management systems [case based (Tulare) vs. task-based (San Diego)] and the WTW populations we serve [6,000 customers (Tulare) vs. over 13,000 customers (San Diego)], both counties face similar challenges, including staffing issues, high WTW caseloads and performance impacts stemming from COVID leniencies. Both counties noted the need to improve eligibility worker knowledge regarding the WTW Program and CalWORKs 2.0 so they can serve as trusted messengers and promote the extensive benefits of WTW. While Tulare plans to create a WTW Fundamentals Training for their non-WTW workforce, San Diego plans on working with our training and organizational development department (The Knowledge Center) to further strengthen existing WTW training modules presented to eligibility staff during the onboarding process. San Diego looks forward to an ongoing, fruitful relationship with Tulare county staff as we diligently work towards CalWORKs WTW system improvement.</p>		
<b>2. Discuss steps taken to conduct peer review.</b>		
<p>The initial peer meeting between San Diego and Tulare Counties was held virtually on 06/05/2023. The meeting included introductions between corresponding county staff, discussions regarding each county's structure for service provision, review of each county's Cal-SIP goals (including development of equity goals), scheduling of future meeting dates and Cal-SIP completion target dates. The counties scheduled a peer review meeting for 07/10/2023, with Tulare County acting as host and San Diego County acting as peer. During the meeting on 07/10/23, the counties scheduled the next peer review meeting for 07/24/23, with San Diego County acting as host and Tulare acting as peer.</p>		
<b>3. Briefly summarize observations and action items from Peer Review process.</b>		
<p>Meeting on 06/05/2023:            During initial meeting on 06/05/2023, each county's structure for service provision was discussed. Tulare identified that their case workers handle the CalWORKs eligibility, WTW, and child care programs jointly. San Diego identified that CalWORKs case management is task-based and handled by County staff while Employment Services (WTW) is managed by contracted, regionalized service providers with cases assigned to individual case managers. Staffing issues, high caseloads and COVID impacts, including related to COVID leniencies, were identified by both counties as impacting performance measure outcomes.</p> <p>Tulare identified their Cal-SIP focus as reengineering and standardizing staff training to obtain increased engagement rate outcomes. Tulare reported current engagement rate at 11% from a previous rate of 75% prior to COVID impacts and their overall goal is to increase this rate to 50% during the initial Cal-SIP period. San Diego identified selected performance measures as increasing first activity participation rate and reducing the rate of exits and reentries (program churn) for CalWORKs families.</p> <p>It was decided that Tulare would serve as initial host county for the first peer review meeting scheduled for 07/10/2023 and San Diego as initial peer county. The counties agreed to include their respective CQI Specialist in future meeting invites. Tulare agreed to share documents related to their Cal-SIP development with San Diego for review prior to the next meeting.</p> <p>Meeting on 07/10/23:            The first peer review meeting between San Diego and Tulare Counties was held on 07/10/23 with Tulare acting as host and San Diego County as peer. During this meeting, San Diego learned that Tulare operates 5 district offices that provide caseload management and serve walk-in customers, as well. Their WTW program serves around 6,000 customers. Tulare utilizes multi-program workers responsible for CalWORKs intake and ongoing case management, WTW and child care programs. Worker caseloads average between 120 to 150 multi-program cases. Due to limited experience of new staff, only seasoned workers are assigned to manage WTW cases. Newer staff are not assigned any WTW cases until they gain more case management experience, often after a few years. Due to staffing issues, high caseloads are a constant challenge for staff. Seasoned staff are especially impacted as they are routinely pulled for other assignments, leading to a reduced focus on WTW cases. COVID leniencies and related blanket WTW exemptions led to a further loss in focus as WTW participation was not required for CalWORKs customers.</p> <p>Tulare's Cal-SIP focus is to reengineer, standardize, and implement staff training regarding WTW (Employment Services) and thereby increase engagement rate outcomes. There has been no formal WTW training conducted by Tulare since 2015. Current WTW training is conducted via peer to peer in their district offices. However, this process has led to differences in knowledge sharing received by trainees. By establishing a consistent WTW training that includes procedural guidance and motivational interviewing techniques that support CalWORKs 2.0 strategies, Tulare seeks to successfully engage customers and address their barriers to participation.</p>		

Tulare developed the following 5 Cal-SIP strategies with their partners and Training Team:

- Formalize procedural training topics to be complete and comprehensive
- Create a curriculum for coaching skills training
- Create an Employment Services (ES) Fundamentals course for non-ES workforce
- Ensure consistency in the delivery of training across offices and classifications
- Follow up training with support by prioritizing ES work

Tulare also developed the following Equity Goal:

- Reverse the drop-off in participation rate for CalLearn participants as they transition to WTW

To assist with staffing impacts, San Diego suggested potential use of the Work Experience (WEX) program to train Tulare's WTW customers regarding internal office procedures and then assist work-ready candidates to apply for open positions within their department, as San Diego has found success using this process. Tulare reported that they had utilized the WEX program to hire WTW customers in the past and would explore reimplementing this process. San Diego County found no issues with Tulare's proposed Cal-SIP strategies or action steps and offered to share WTW training materials, if needed.

Meeting on 07/24/23:

The second peer review meeting between San Diego and Tulare Counties was held on 07/24/23. As host, San Diego County provided a PowerPoint presentation regarding the San Diego Cal-SIP development, strategies, and status. Topics discussed included Cal-SIP target areas (First Activity Participation Rate and Reducing CalWORKs Program Churn), related baseline calculation methodology, improvement strategies and anticipated outcomes regarding target areas, and next steps in the Cal-SIP development process. Tulare provided insightful input regarding proposed system improvement strategies, including sharing ideas regarding Equity Goals that San Diego was developing at that time.

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<b>Goal 1</b>			
<b>Specific</b>			
<b>Measureable</b>	Increase	First Activity Attendance Rate	to
<b>Attainable</b>	75%	from	33%
<b>Realistic</b>	Review using	DB, county adhoc reports, individual-level data	improving by
<b>Timebound</b>	5.3%	every	3 months
	within	2 years	

**Goal 1 SMART Summary:**  
 Increase First Activity Attendance Rate to 75% from 33%.  
 Review using DB, county adhoc reports, individual-level data improving by 5.3% every 3 months within 2 years (for a total of a 42.0% improvement).

<b>Strategies</b>			
Number of Strategies for Goal 1	5	<a href="#">Press to Hide</a>	<a href="#">Press to Unhide</a> <small>Press Hide button after selecting your number of strategies AND number of action steps per strategy, press Unhide to undo</small>
Strategy 1	Implement a warm hand off process to ES staff to engage non-responsive customers during customer calls with eligibility or call center staff		
Number of Action Steps for Strategy 1	4		
Action Step 1	Remind FRC and Access Call Center staff to review journal comments to identify if ES has made unsuccessful attempts to reach customer		
Action Step 2	Customer will be transferred to assigned ES case manager after completing transaction with FRC or Access staff		
Action Step 3	Standardize warm hand off process across Family Resource Centers (CalWORKs Offices) and Access Call Center		
Action Step 4	Ensure that all ES sites have updated staff rosters that will be shared with Access and FRC staff		
Strategy 2	Improve the Employment Services (ES) knowledge base of eligibility staff so that they can serve as trusted messengers and positively promote the ES program		
Number of Action Steps for Strategy 2	3		
Action Step 1	Revise CalWORKs Intake packets to ensure that County developed materials promote ES and reflect supportive CalWORKs 2.0 messaging		
Action Step 2	Work with HHSA training department - The Knowledge Center - to update the ES training module for onboarding Human Services Specialists (eligibility staff)		

Action Step 3	Ensure that the updated module is robust, reflects positive ES messaging and outlines major CalWORKs 2.0 goals and strategies	
Strategy 3	ES Unit Managers to conduct increased monitoring meetings with ES case managers	
Number of Action Steps for Strategy 3	3	
Action Step 1	Meetings will focus on evaluating engagement levels of assigned ES customers	
Action Step 2	ES Unit Manager will provide guidance and feedback regarding increasing customer engagement levels, as needed	
Action Step 3	ES to provide monthly report out regarding outcomes of monitoring meetings during monthly coordination meetings with County Self-Sufficiency Services	
Strategy 4	ES will leverage existing relationships with community partners to encourage mutual customers to reengage with ES services	
Number of Action Steps for Strategy 4	2	
Action Step 1	ES to leverage partnerships - including with ESE/EWE employers and community colleges - to notify and encourage non-responsive, mutual customers to reengage with ES services	
Action Step 2	ES to provide monthly report out regarding outcomes of leveraging ESE/EWE employers and community partners to reach non-responsive customers during monthly coordination meetings with County Self-Sufficiency Services	
Strategy 5	ES staff from different sections will conduct increased Multi-Disciplinary Team (MDT) meetings with mutual customers to develop effective barrier removal strategies in a trauma-informed manner	

Number of Action Steps for Strategy 5	3
Action Step 1	County SSS will continue to promote MDT meetings as a trauma-informed practice to provide barrier removal services and improve customer engagement
Action Step 2	ES MDT meetings will focus on vital barrier removal areas such as employment, supplemental income, and housing
Action Step 3	ES to provide monthly report out regarding outcomes of increasing MDT meetings during monthly coordination meetings with County Self-Sufficiency Services

<b>Goal 2</b>			
<b>Specific</b>	Decrease	Rate of Program Reentries	<i>to</i>
<b>Measureable</b>	15%	<i>from</i>	18%
<b>Attainable</b>	<i>Review using</i>	DB, CA 253 CW reports, county adhoc reports, individual-level data	<i>improving by</i>
<b>Realistic</b>	0.4%	<i>every</i>	3 months
<b>Timebound</b>	<i>within</i>	2 years	

**Goal 2 SMART Summary:**  
 Decrease Rate of Program Reentries to 15% from 18%  
 Review using DB, CA 253 CW reports, county adhoc reports, individual-level data improving by 0.4% every 3 months within 2 years (for a total of a 3.0% improvement)

<b>Strategies</b>				
Number of Strategies for Goal 2	5	Press to Hide	Press to Unhide	Press Hide button after selecting your number of strategies AND number of action steps per strategy, press Unhide to undo
Strategy 1	Issue policy reminder memo regarding rescinding application denials, restoration of aid policies, and evaluating discontinuances for no redetermination for Good Cause			



Number of Action Steps for Strategy 1	4	
Action Step 1	Work with Program Specialists to develop a policy reminder memo regarding rescinding CalWORKs denials when verification is provided within extended deadline, evaluating CalWORKs cases that recently discontinued due to SAR 7 reasons for restoration of aid, and evaluating CalWORKs cases following a discontinuance for no redetermination for Good Cause	
Action Step 2	Ensure that memo verbiage reflects Cal-SIP goal re reducing rate of CW Program reentries	
Action Step 3	Monitor memo through standard sign-off process	
Action Step 4	Ensure that approved memo is posted for staff access	
Strategy 2	Discuss Policy Memo and related references in Policy and Accuracy Review (PAR) meeting, eligibility Corrective Action Review Meeting (CARM), and ES CARM	
Number of Action Steps for Strategy 2	3	
Action Step 1	Coordinate with lead for each meeting to schedule Memo for discussion	
Action Step 2	Review policy memo during each scheduled meeting - including related Cal-SIP goal re reducing rate of CW Program reentries	
Action Step 3	Answer related policy questions, as needed, during each meeting	
Strategy 3	Leverage CA 253 CalWORKs Report (Reasons for Discontinuances of Cash Grant) and county adhoc reports regarding CalWORKs Program churn to monitor discontinuance reasons under county control	

Number of Action Steps for Strategy 3	3	
Action Step 1	Review issued reports to identify anomalies re discontinuance reasons under county influence	
Action Step 2	Share areas of concern with staff during eligibility and ES CARMs	
Action Step 3	Work with partners to develop additional strategies, as needed, to target identified areas of concern	

Strategy 4	Issue reminder e-mail for eligibility and ES staff regarding various methods that customers can use to submit documentation	
Number of Action Steps for Strategy 4	4	
Action Step 1	E-mail will outline all options available to customers for CalWORKs documentation submission - including in-person, BenefitsCal, from their computer or smartphone camera using the LaterDocs system, via e-mail, using the Employment Services Request (ESR) process, and by standard mail	
Action Step 2	E-mail will include links, as appropriate, to related submission system or policy sections	
Action Step 3	Issue final approved e-mail to County All Staff distribution list and to ES distribution lists	
Action Step 4	Answer any related questions received from eligibility or ES staff	

Strategy 5	Monitor Haitian/Creole language cases to ensure rate of program reentries also decreases over time (Equity Goal)	
Number of Action Steps for Strategy 5	2	
Action Step 1	Monitor outcomes using CalWORKs Outcomes and Accountability Review Dashboard data regarding Rate of Program Reentries by	
Action Step 2	Develop additional strategies with partners, if needed, to target outcomes regarding Haitian/Creole speaking customers	

Goal 3			
Specific	Select	Select	to
Measureable		from	

Attainable	Review using		increasing by
Realistic		every	Select
Timebound	within	Select	

**Goal 3 SMART Summary:**  
Please complete all sections of SMART Framework, when all sections are completed a summary will appear here.

<b>Strategies</b>	
Number of Strategies for Goal 3	Select

Press Hide button after selecting your number of strategies AND number of action steps per strategy, press Unhide to undo

<b>Goal 4</b>			
Specific	Select	Select	to
Measureable		from	
Attainable	Review using		increasing by
Realistic		every	Select
Timebound	within	Select	

**Goal 4 SMART Summary:**  
Please complete all sections of SMART Framework, when all sections are completed a summary will appear here.

<b>Strategies</b>	
Number of Strategies for Goal 4	Select

Press Hide button after selecting your number of strategies AND number of action steps per strategy, press Unhide to undo

<b>Goal 5</b>			
Specific	Select	Select	to
Measureable		from	
Attainable	Review using		increasing by
Realistic		every	Select
Timebound	within	Select	

**Goal 5 SMART Summary:**  
Please complete all sections of SMART Framework, when all sections are completed a summary will appear here.

<b>Strategies</b>	
Number of Strategies for Goal 5	Select

Press Hide button after selecting your number of strategies AND number of action steps per strategy, press Unhide to undo

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Measure-level Descriptions
1. Describe the reason for selecting the measure or programmatic grouping of measures.
<p>To develop the CalWORKs County Self-Assessment (Cal-CSA), San Diego County HHS leveraged the San Diego County Access and Enrollment Assessment Report which evaluated the Agency's outreach, enrollment, and accessibility to various assistance programs, including CalWORKs. The report identified reducing the rate of exits and reentries (churn) as a key method to reduce the potential economic impact on CalWORKs customers due to the loss of their cash benefits. We also selected this measure as the loss of cash aid benefits can have a destabilizing and traumatic effect on CalWORKs families that often have limited resources, job skills and coping mechanisms and also seriously interrupts all progress towards self sufficiency being accomplished through the WTW program participation. The former WTW participant is forced to shift their efforts and time toward reestablishing CalWORKs eligibility rather than participate in assigned WTW activities. In addition to losing their CalWORKs grant, WTW participants may lose supportive services payments that assist with transportation, ancillary and diaper needs, educational stipends to assist with books and educational supplies and access to barrier removal services such as mental health and substance use services. This loss may be a traumatic experience for CalWORKs families leading to a loss of focus and momentum on their journey towards self-sufficiency. The family may experience financial instability that may in turn lead to housing instability and the need for additional services such as intensive case management, wrap-around services, Family Stabilization services, and/or homeless assistance services. By focusing on reducing the rate of exits and reentries, even in incremental amounts, our CalWORKs families will be more likely to retain financial stability, receive needed work supports and barrier removal services, continue on their path towards self-sufficiency and this in term may lead to increased WTW participation outcomes.</p> <p>San Diego County also identified the First Activity Participation Rate target for improvement due to lower overall outcomes reflected in Cal-OAR Performance Measures (Phase 1 data) when compared to other performance outcome findings. As this rate measures the participation outcomes of mostly new customers after signing their first WTW Plan, participation increases regarding this population will likely lead to increased participation and engagement outcomes and corresponding reductions in noncompliance and sanction rates.</p> <p>While conducting the disaggregated data analysis for our Cal-CSA report, San Diego County also identified the Rate of Exit and Reentries of Other language cases during the baseline period (04/2021 - 09/2021) as higher than Spanish speaking cases.</p>
2. Do partners and collaborators agree this is a measure or programmatic grouping of measures that should be focused on at this time?
<p>ES partners and our peer review county (Tulare) provided direct feedback and support regarding selected measures for improvement. ES partners support efforts to reduce the rate of CalWORKs program exits and reentries as loss of cash aid benefits is often followed by termination of WTW case management and related supportive services payments. The former WTW participant is forced to shift their efforts and time toward reestablishing CalWORKs eligibility instead of participating in WTW activities. Increasing the First Activity Participation Rate was also largely supported as this measures the participation outcomes of mostly new customers after signing their first WTW Plan. Increasing this rate will likely lead to reduced noncompliance and sanction rates and corresponding increases in engagement rate outcomes.</p>
3. Describe any anticipated interactions with other measures.
<p>By reducing the rate of CalWORKs exits and reentries, WTW customers will be more likely to maintain financial stability which may in turn lead to increased WTW participation rate outcomes for San Diego County. Efforts to increase the First Activity Participation Rate may also have a positive impact on the overall WTW engagement rate and potentially lead to reduced sanction rate outcomes for our county.</p>
4. Describe how the CWD will track performance measure improvement.
<p>San Diego County will monitor and analyze the results of the proposed system improvement strategies for the First Activity Participation rate and Rate of Exits and Reentries in a continuous and methodical manner, using available quarterly Cal-OAR data dashboard reports, monthly CA 253 CW (CalWORKs Reasons for Discontinuances of Cash Grant Report), and internal monthly ad hoc reports regarding CalWORKs customers who exited and returned to the program (CalWORKs Churn Reports). While dashboard stats will provide overall performance outcomes, including regarding Rate of Exits and Reentries of Other Language cases (Equity Goal), use of the CA 253 report which tracks 11 common discontinuance reasons, will assist in identifying anomalies or trends regarding specific discontinuance reasons within our scope of influence that HHS can target for improved outcomes, and local churn reports will assist us in identifying specific CalWORKs office(s) to target for additional support. As Cal-OAR is a standing agenda/discussion item during monthly ES Coordination Meetings and ES Corrective Action Review Meetings, Cal-OAR leads will utilize these opportunities to discuss Cal-SIP topics, share related updates and obtain the pulse regarding effectiveness of implemented strategies.</p>

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Goal-level Descriptions
<b>Goal 1</b>
<b>Increase First Activity Attendance Rate to 75% from 33%.</b>
<b>Review using DB, county adhoc reports, individual-level data improving by 5.3% every 3 months within 2 years (for a total of a 42.0% improvement).</b>
<b>Strategy 1 Implement a warm hand off process to ES staff to engage non-responsive customers during customer calls with eligibility or call center staff</b>
<b>Strategy 2 Improve the Employment Services (ES) knowledge base of eligibility staff so that they can serve as trusted messengers and positively promote the ES</b>

<b>Strategy 3 ES Unit Managers to conduct increased monitoring meetings with ES case managers</b>
<b>Strategy 4 ES will leverage existing relationships with community partners to encourage mutual customers to reengage with ES services</b>
<b>Strategy 5 ES staff from different sections will conduct increased Multi-Disciplinary Team (MDT) meetings with mutual customers to develop effective barrier removal strategies in a trauma-informed manner</b>
<b>1. Explain the reasoning or methodology which was used to determine this goal.</b>
A baseline of 33% was calculated using the First Activity Attendance Rate data in the Cal-OAR data dashboard for San Diego County during the period of 04/2021 - 09/2021. San Diego developed the 75% goal regarding First Activity Participation based on recent Cal-OAR Performance Measure outcomes (Phase 1) for 12/2022 which reflected a rate of 85.5%. The targeted goal is further supported due to ongoing efforts by ES staff to engage or reengage WTW customers in a methodical, supportive manner coupled with San Diego's continuous monitoring of these efforts.
<b>2. What led the CWD to these improvement strategies?</b>
San Diego determined that a multifaceted approach was needed to target our First Activity Attendance Rate. Ongoing discussions with ES partners identified the need to reach customers who are non-responsive to ES engagement efforts. The need to increase the ES knowledgebase of eligibility staff was identified during internal CalWORKs Team Meetings and supported further during peer review meetings with Tulare County. The need for ES unit managers to conduct increased monitoring meetings with ES case managers and to increase their use of multi-disciplinary team (MDT) meetings with mutual customers was identified as a best practice during Team Meetings with CalWORKs staff embedded at ES sites. The use of leveraging existing relationships with community partners to reengage mutual customers was identified both during Team Meetings with CalWORKs staff embedded at ES sites and during monthly coordination meetings with ES staff. Altogether these strategies are anticipated to increase our First Activity Attendance Rate during this Cal-SIP period.
<b>3. Discuss any research or literature that supports the strategies chosen. Cite reference.</b>
Ongoing discussions with ES partners identified the need to reach customers who are non-responsive to ES engagement efforts. Many of these same customers communicate with eligibility or Access call center staff regarding their CalWORKs cash aid benefits. The need to implement a warm hand-off process was identified as a method to potentially reach these customers.  The need to increase the ES knowledgebase of eligibility staff was identified during internal CalWORKs Team Meetings and supported further during peer review meetings with Tulare County. Both counties noted the need to improve eligibility worker knowledge regarding the WTW Program and CalWORKs 2.0 so they can serve as trusted messengers and promote the extensive benefits of WTW. The ES strategy regarding leveraging existing relationships with community partners to encourage mutual customers to reengage in ES services also reflects the use of trusted messengers to reach non-responsive customers.
<b>4. Describe the roles of other partners and collaborators in implementing the strategies.</b>
Family Resource Center (FRC)/CalWORKs offices and Access call center staff will be key players in the warm hand off process. They will be responsible for reviewing journal comments to identify customers who are non-responsive to ES contact efforts and then transferring them to designated ES staff for engagement efforts.  CalWORKs program staff will work closely with trainers at the HHS training department - The Knowledge Center - to update the ES training module for onboarding Human Services Specialists (eligibility staff).  ES unit managers will be responsible for increased monitoring of their case managers with regard to increasing the engagement rate of their customers. CalWORKs Program staff embedded at ES sites will also monitor and support this process and report any concerns to the CalWORKs Program Manager.  ES staff will also be instrumental in leveraging existing relationships with community partners to reengage mutual customers and conducting MDT meetings with mutual customers. These efforts will also be monitored by CalWORKs Program staff embedded at ES sites.
<b>5. Identify any staff education and training needs, and include any technical assistance needed to implement strategy and achieve goal.</b>
Although no technical assistance needs were identified to implement strategies for increasing the First Activity Attendance Rate, San Diego will continuously monitor outcomes to identify any ES staff education or training needs related to improving First Activity Attendance Rate outcomes.
<b>6. Describe how the CWD plans to mitigate and/or address both known internal and external barriers [to achieve the goal]</b>
Previous Response: San Diego plans to implement improvement strategies to increase the First Activity Attendance Rate using only currently available resources.  Revised Response: San Diego will mitigate/address internal and external barriers utilizing ongoing monitoring and communication with key liaisons at Family Resource Centers (FRCs) (CalWORKs offices), the Access call center, the HHS training department - The Knowledge Center, and at ES sites. Sites will be highly encouraged to identify any barriers to strategy implementation at the earliest opportunity to enable course corrections, as needed. San Diego plans to implement improvement strategies regarding First Activity Attendance Rate outcomes using only currently available resources.

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.

Cal-OAR leads, under the guise of the CalWORKs/WTW Program Manager will be responsible for the continuous evaluation of all action steps related to increasing the First Activity Participation rate of WTW participants. San Diego will utilize CalWORKs Outcomes and Accountability Review Dashboard data to monitor these outcomes.

<b>Goal 2</b>
<b>Decrease Rate of Program Reentries to 15% from 18%</b> <b>Review using DB, CA 253 CW reports, county adhoc reports, individual-level data improving by 0.4% every 3 months within 2 years (for a total of a 3.0% improvement)</b>
<b>Strategy 1 Issue policy reminder memo regarding rescinding application denials, restoration of aid policies, and evaluating discontinuances for no redetermination for Good Cause</b>
<b>Strategy 2 Discuss Policy Memo and related references in Policy and Accuracy Review (PAR) meeting, eligibility Corrective Action Review Meeting (CARM), and ES CARM</b>
<b>Strategy 3 Leverage CA 253 CalWORKs Report (Reasons for Discontinuances of Cash Grant) and county adhoc reports regarding CalWORKs Program churn to monitor discontinuance reasons under county control</b>
<b>Strategy 4 Issue reminder e-mail for eligibility and ES staff regarding various methods that customers can use to submit documentation</b>
<b>Strategy 5 Monitor Haitian/Creole language cases to ensure rate of program reentries also decreases over time (Equity Goal)</b>
<b>1. Explain the reasoning or methodology which was used to determine this goal.</b>
To develop the CalWORKs County Self-Assessment (Cal-CSA), San Diego County HHSA leveraged the San Diego County Access and Enrollment Assessment Report which evaluated the Agency's outreach, enrollment, and accessibility to various assistance programs, including CalWORKs. The report identified reducing the rate of exits and reentries (churn) as a key method to reduce the potential economic impact on CalWORKs customers due to the loss of their cash benefits. Reasons for churn identified in the report included: customers forgetting to complete the eligibility redetermination process, customers not knowing there is an eligibility redetermination process, customers not receiving redetermination reminders due to an address change or lack of permanent address, and additional issues related to technology literacy and digital access. In addition to losing their CalWORKs grant, WTW participants may lose supportive services payments that assist with transportation, ancillary and diaper needs, educational stipends to assist with books and educational supplies and access to barrier removal services such as mental health and substance use services. This loss may be a traumatic experience for CalWORKs families leading to a loss of focus and momentum on their journey towards self-sufficiency. By focusing on reducing the rate of exits and reentries during the Cal-SIP phase, even in incremental amounts, our CalWORKs families will be more likely to retain financial stability, receive needed work supports and barrier removal services, continue on their path towards self-sufficiency, and this may lead to increased WTW participation outcomes. A baseline of 18% was calculated using the Exits and Reentries data in the Cal-OAR data dashboard for San Diego County during the period of 04/2021 - 09/2021. Similarly a baseline of 678 monthly CalWORKs cases was determined by averaging the reasons for discontinuance of cash grant cases from the monthly CA 253 CW (CalWORKs Reasons for Discontinuances of Cash Grant Report) during the same period. San Diego consciously opted for an incremental goal due to several factors. Outcomes regarding Exits and Reentries in the cal-OAR data dashboard fluctuate markedly. While baseline outcomes are at 18%, the most recent available data for the 10/2021 - 12/2021 quarter reflects a reentry rate of 23.2%. In addition, many of the 11 discontinuance reasons reflected on the CA 253 CW, such as increased earnings, no eligible child, and children no longer deprived of support or care, are not within the scope of influence that HHSA can target for improved outcomes.
<b>2. What led the CWD to these improvement strategies?</b>
San Diego identified the need for an educational campaign to strengthen staff knowledge and increase awareness regarding policies related to preventing or reducing CalWORKs program discontinuance, restoration of aid, and evaluating discontinued cases for Good Cause which may lead to the expedited reinstatement of CalWORKs cash aid. The need to issue reminders regarding all options available to customers for documentation submission was also identified. Feedback during monthly ES Coordination Meetings and Peer Review meetings with Tulare County staff further reinforced the selected strategies to target decreases in the rate of CalWORKs program reentries.
<b>3. Discuss any research or literature that supports the strategies chosen. Cite reference.</b>
As previously cited, the San Diego County Access and Enrollment Assessment Report recommended reducing the rate of exits and reentries as a key method to reduce the potential economic impact on CalWORKs customers due to the loss of their cash benefits and identified various reasons obtained during stakeholder engagement related to program churn, including customers forgetting to complete the eligibility redetermination process, customers not knowing there is an eligibility redetermination process, and customers not receiving redetermination reminders due to an address change or lack of permanent address.
<b>4. Describe the roles of other partners and collaborators in implementing the strategies.</b>

Family Resource Center (FRC)/CalWORKs offices and ES staff will be instrumental in identifying customers whose CalWORKs case is pending discontinuance. They will also work together to assist customers with submitting documentation needed to maintain their CalWORKs case active. FRC staff will be instrumental in identifying CalWORKs families whose case recently discontinued during the application process and evaluating them for restoration of aid and/or evaluation of Good Cause which may lead to the expedited reinstatement of CalWORKs cash aid.

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

Although no technical assistance needs were identified to implement strategies for reducing the rate of program reentries, San Diego identified the need to issue policy reminders in line with CDSS practice to reinforce staff education regarding policies for rescinding application denials, restoration of aid, and evaluating redetermination discontinuances for Good Cause. In addition, reminders will be issued regarding all options available to customers for documentation submission, including in-person, BenefitsCal, from their computer or smartphone camera using the LaterDocs system, via e-mail, using the Employment Services Request (ESR) process, and by standard mail.

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

San Diego will mitigate/address internal and external barriers utilizing ongoing monitoring and communication with key liaisons at Family Resource Centers (FRCs) (CalWORKs offices) by providing an educational campaign to strengthen staff knowledge and increase awareness regarding policies related to preventing or reducing CalWORKs program discontinuance. Sites will be encouraged to identify any barriers to strategy implementation at the earliest opportunity to enable course corrections, as needed. San Diego plans to implement improvement strategies regarding First Activity Attendance Rate outcomes using only currently available resources.

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.

Cal-OAR leads, under the guise of the CalWORKs/WTW Program Manager will be responsible for the continuous evaluation of all action steps related to reducing the rate of CalWORKs program reentries. San Diego will utilize CalWORKs Outcomes and Accountability Review Dashboard data, CA 253 CalWORKs Report (Reasons for Discontinuances of Cash Grant) and county adhoc reports regarding CW Program churn to monitor discontinuance reasons under county control. These reports will also be utilized to monitor outcomes regarding Other language cases to ensure rate of program reentries also decreases over time.

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San Diego

Cal-OAR Cycle Period

FY 2021 - 2026

TARGET MEASURE SUMMARY PAGE

Goal #	1. Performance Measure	2. Baseline Result	3. Goal(s)	4. Strategies	5. Cal-SIP Start Time	6a. Progress Report #1	6b. Progress Report #2	6c. Cycle End Date	7. Tracking Improvement
Goal 1	First Activity Attendance Rate	33%	Increase First Activity Attendance Rate to 75% from 33%., Review using DB, county adhoc reports, individual-level data improving by 5.3% every 3 months within 2 years (for a total of a 42.0% improvement).	<p>Strategy 1: Implement a warm hand off process to ES staff to engage non-responsive customers during customer calls with eligibility or call center staff (With 4 Action Steps); Strategy 2: Improve the Employment Services (ES) knowledge base of eligibility staff so that they can serve as trusted messengers and positively promote the ES program (With 3 Action Steps); Strategy 3: ES Unit Managers to conduct increased monitoring meetings with ES case managers (With 3 Action Steps);</p> <p>Strategy 4: ES will leverage existing relationships with community partners to encourage mutual customers to reengage with ES services (With 2 Action Steps); Strategy 5: ES staff from different sections will conduct increased Multi-Disciplinary Team (MDT) meetings with mutual customers to develop effective barrier removal strategies in a trauma-informed manner (With 3 Action Steps);</p>	2/1/2024	2/21/2025	3/27/2026	6/30/2026	Cal-OAR leads, under the guise of the CalWORKs/WTW Program Manager will be responsible for the continuous evaluation of all action steps related to increasing the First Activity Participation rate of WTW participants. San Diego will utilize CalWORKs Outcomes and Accountability Review Dashboard data to monitor these outcomes.
Goal 2	Rate of Program Reentries	18%	Decrease Rate of Program Reentries to 15% from 18%, Review using DB, CA 253 CW reports, county adhoc reports, individual-level data improving by 0.4% every 3 months within 2 years (for a total of a 3.0% improvement)	<p>Strategy 1: Issue policy reminder memo regarding rescinding application denials, restoration of aid policies, and evaluating discontinuances for no redetermination for Good Cause (With 4 Action Steps); Strategy 2: Discuss Policy Memo and related references in Policy and Accuracy Review (PAR) meeting, eligibility Corrective Action Review Meeting (CARM), and ES CARM (With 3 Action Steps);</p> <p>Strategy 3: Leverage CA 253 CalWORKs Report (Reasons for Discontinuances of Cash Grant) and county adhoc reports regarding CalWORKs Program churn to monitor discontinuance reasons under county control (With 3 Action Steps);</p> <p>Strategy 4: Issue reminder e-mail for eligibility and ES staff regarding various methods that customers can use to submit documentation (With 4 Action Steps); Strategy 5: Monitor Haitian/Creole language cases to ensure rate of program reentries also decreases over time (Equity Goal) (With 2 Action Steps);</p>	2/1/2024	2/21/2025	3/27/2026	6/30/2026	Cal-OAR leads, under the guise of the CalWORKs/WTW Program Manager will be responsible for the continuous evaluation of all action steps related to reducing the rate of CalWORKs program reentries. San Diego will utilize CalWORKs Outcomes and Accountability Review Dashboard data, CA 253 CalWORKs Report (Reasons for Discontinuances of Cash Grant) and county adhoc reports regarding CW Program churn to monitor discontinuance reasons under county control. These reports will also be utilized to monitor outcomes regarding Other language cases to ensure rate of program reentries also decreases over time.

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Press to Hide

Press to Unhide

<b>Goal 1</b>	Increase First Activity Attendance Rate to 75% from 33%. Review using DB, county adhoc reports, individual-level data improving by 5.3% every 3 months within 2 years (for a total of a 42.0% improvement).
<b>Strategy 1</b>	Implement a warm hand off process to ES staff to engage non-responsive customers during customer calls with eligibility or call center staff 4 Action Steps: Action Step 1: Remind FRC and Access Call Center staff to review journal comments to identify if ES has made unsuccessful attempts to reach customer Action Step 2: Customer will be transferred to assigned ES case manager after completing transaction with FRC or Access staff Action Step 3: Standardize warm hand off process across Family Resource Centers (CalWORKs Offices) and Access Call Center Action Step 4: Ensure that all ES sites have updated staff rosters that will be shared with Access and FRC staff
<b>Strategy 2</b>	Improve the Employment Services (ES) knowledge base of eligibility staff so that they can serve as trusted messengers and positively promote the ES program 3 Action Steps: Action Step 1: Revise CalWORKs Intake packets to ensure that County developed materials promote ES and reflect supportive CalWORKs 2.0 messaging Action Step 2: Work with HHSA training department - The Knowledge Center - to update the ES training module for onboarding Human Services Specialists (eligibility staff) Action Step 3: Ensure that the updated module is robust, reflects positive ES messaging and outlines major CalWORKs 2.0 goals and strategies
<b>Strategy 3</b>	ES Unit Managers to conduct increased monitoring meetings with ES case managers 3 Action Steps: Action Step 1: Meetings will focus on evaluating engagement levels of assigned ES customers Action Step 2: ES Unit Manager will provide guidance and feedback regarding increasing customer engagement levels, as needed Action Step 3: ES to provide monthly report out regarding outcomes of monitoring meetings during monthly coordination meetings with County Self-Sufficiency Services
<b>Strategy 4</b>	ES will leverage existing relationships with community partners to encourage mutual customers to reengage with ES services 2 Action Steps: Action Step 1: ES to leverage partnerships - including with ESE/EWE employers and community colleges - to notify and encourage non-responsive, mutual customers to reengage with ES services Action Step 2: ES to provide monthly report out regarding outcomes of leveraging ESE/EWE employers and community partners to reach non-responsive customers during monthly coordination meetings with County Self-Sufficiency Services
<b>Strategy 5</b>	ES staff from different sections will conduct increased Multi-Disciplinary Team (MDT) meetings with mutual customers to develop effective barrier removal strategies in a trauma-informed manner 3 Action Steps: Action Step 1: County SSS will continue to promote MDT meetings as a trauma-informed practice to provide barrier removal services and improve customer engagement Action Step 2: ES MDT meetings will focus on vital barrier removal areas such as employment, supplemental income, and housing Action Step 3: ES to provide monthly report out regarding outcomes of increasing MDT meetings during monthly coordination meetings with County Self-Sufficiency Services
<b>Goal 2</b>	Decrease Rate of Program Reentries to 15% from 18% Review using DB, CA 253 CW reports, county adhoc reports, individual-level data improving by 0.4% every 3 months within 2 years (for a total of a 3.0% improvement)
<b>Strategy 1</b>	Issue policy reminder memo regarding rescinding application denials, restoration of aid policies, and evaluating discontinuances for no redetermination for Good Cause 4 Action Steps: Action Step 1: Work with Program Specialists to develop a policy reminder memo regarding rescinding CalWORKs denials when verification is provided within extended deadline, evaluating CalWORKs cases that recently discontinued due to SAR 7 reasons for restoration of aid, and evaluating CalWORKs cases following a discontinuance for no redetermination for Good Cause Action Step 2: Ensure that memo verbiage reflects Cal-SIP goal re reducing rate of CW Program reentries Action Step 3: Monitor memo through standard sign-off process Action Step 4: Ensure that approved memo is posted for staff access
<b>Strategy 2</b>	Discuss Policy Memo and related references in Policy and Accuracy Review (PAR) meeting, eligibility Corrective Action Review Meeting (CARM), and ES CARM

3 Action Steps: Action Step 1: Coordinate with lead for each meeting to schedule Memo for discussion Action Step 2: Review policy memo during each scheduled meeting - including related Cal-SIP goal re reducing rate of CW Program reentries Action Step 3: Answer related policy questions, as needed, during each meeting	
Strategy 3	Leverage CA 253 CalWORKs Report (Reasons for Discontinuances of Cash Grant) and county adhoc reports regarding CalWORKs Program churn to monitor discontinuance reasons under county control
3 Action Steps: Action Step 1: Review issued reports to identify anomalies re discontinuance reasons under county influence Action Step 2: Share areas of concern with staff during eligibility and ES CARMs Action Step 3: Work with partners to develop additional strategies, as needed, to target identified areas of concern	
Strategy 4	Issue reminder e-mail for eligibility and ES staff regarding various methods that customers can use to submit documentation
4 Action Steps: Action Step 1: E-mail will outline all options available to customers for CalWORKs documentation submission - including in-person, BenefitsCal, from their computer or smartphone camera using the LaterDocs system, via e-mail, using the Employment Services Request (ESR) process, and by standard mail Action Step 2: E-mail will include links, as appropriate, to related submission system or policy sections Action Step 3: Issue final approved e-mail to County All Staff distribution list and to ES distribution lists Action Step 4: Answer any related questions received from eligibility or ES staff	
Strategy 5	Monitor Haitian/Creole language cases to ensure rate of program reentries also decreases over time (Equity Goal)
2 Action Steps: Action Step 1: Monitor outcomes using CalWORKs Outcomes and Accountability Review Dashboard data regarding Rate of Program Reentries by Language and by Race Action Step 2: Develop additional strategies with partners, if needed, to target outcomes regarding Haitian/Creole speaking customers	

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**Submission Instructions**

Please read instructions thoroughly and completely prior to beginning form

*Please upload the completed document to the Cal-OAR SFT site at <https://safe.cdt.ca.gov/>. In addition, please email your Cal-OAR CQI Specialist when the document is uploaded.*

When submitting, please include the following Appendix documents:

Appendix A: Cal-OAR Report Signature Sheet

Appendix B: Cal-OAR Team and Partners and Collaborators

Appendix C: Supporting Information

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**Executive Summary**

*The Executive Summary is a high-level overview of the information in the Cal-SIP; it should not exceed one page. Within this section, these answers are prepopulated based upon answers in previous tabs. Please make sure to edit and add to these answers to read as a narrative. Do not protect this sheet or the code will not work.*

**1. Performance measures selected for improvement**

First Activity Attendance Rate  
Rate of Program Reentries

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

Select County county seeks to improve their performance by implementing the following strategies:



Strategy 1: Implement a warm hand off process to ES staff to engage non-responsive customers during customer calls with eligibility or call center staff (With 4 Action Steps); Strategy 2: Improve the Employment Services (ES) knowledge base of eligibility staff so that they can serve as trusted messengers and positively promote the ES program (With 3 Action Steps); Strategy 3: ES Unit Managers to conduct increased monitoring meetings with ES case managers (With 3 Action Steps); Strategy 4: ES will leverage existing relationships with community partners to encourage mutual customers to reengage with ES services (With 2 Action Steps); Strategy 5: ES staff from different sections will conduct increased Multi-Disciplinary Team (MDT) meetings with mutual customers to develop effective barrier removal strategies in a trauma-informed manner (With 3 Action Steps);

Strategy 1: Issue policy reminder memo regarding rescinding application denials, restoration of aid policies, and evaluating discontinuances for no redetermination for Good Cause (With 4 Action Steps); Strategy 2: Discuss Policy Memo and related references in Policy and Accuracy Review (PAR) meeting, eligibility Corrective Action Review Meeting (CARM), and ES CARM (With 3 Action Steps); Strategy 3: Leverage CA 253 CalWORKs Report (Reasons for Discontinuances of Cash Grant) and county adhoc reports regarding CalWORKs Program churn to monitor discontinuance reasons under county control (With 3 Action Steps); Strategy 4: Issue reminder e-mail for eligibility and ES staff regarding various methods that customers can use to submit documentation (With 4 Action Steps); Strategy 5: Monitor Other language cases to ensure rate of program reentries also decreases over time (With 2 Action Steps);

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## CAL-OAR REPORT SIGNATURE SHEET

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

<b>County</b>	San Diego
<b>Submission Date</b>	09/12/2023
<b>Cal-CQI Cycle</b>	2019-2022 Cycle
<b>County Welfare Director</b>	
<b>Name</b>	Rick Wanne
<b>Signature</b>	
<b>Phone Number</b>	(619) 338-2876
<b>Board of Supervisors (BOS) Representative Signature – For Cal-SIP Approval Only</b>	
<b>BOS Approval Date</b>	December 10, 2024
<b>Name</b>	<b>Andrew Potter</b>
<b>Title/Position</b>	<b>Clerk of the Board</b>
<b>Signature</b>	


### Contact Information

<b>County Cal-OAR Contact</b>	<b>Name and Title</b>	Patty Baker - CalWORKs/WTW Program Manager
	<b>Phone &amp; E-mail</b>	(619) 338-2321 patty.baker@sdcounty.ca.gov

**Scan and email the Signature Sheet to [Cal-OAR@dss.ca.gov](mailto:Cal-OAR@dss.ca.gov) with the Cal-OAR Report.**

Approved and/or authorized by the  
Board of Supervisors of the County of San Diego.

Meeting Date: 12/10/24 Minute Order No. 16

By:  Date: 12/18/24

Deputy Clerk of the Board Supervisors

By: _____		Date: _____	
Meeting Date: _____		Meeting Order No: _____	
Board of Supervisors of the County of San Diego Approved and attested by the			

Clerk of the Board  
 Andrew Foster