Appendix A

The Pathways Case Management System

The Pathways Case Management System was developed by Project Match specifically for state and local welfare agencies, to be used in a mandatory setting. Though based on the same principles of human development, the Pathways System is separate and distinct from the voluntary community-based employment program that Project Match has operated in Chicago since 1985.

The goal of Pathways is to restructure interactions between caseworkers and welfare recipients to ensure that recipients do not get "stuck" in one place, but make progress each month toward economic and family stability. A key principle of Pathways is that economic and family stability can mean something different for each welfare recipient. In regard to economic stability, it might mean working full-time and leaving welfare, or combining part-time work with welfare, or transferring to another government program such as Supplemental Security Income (SSI). In regard to family stability, it might mean ending an abusive relationship or, in different cases, getting married; it might mean getting a child treatment for a chronic medical condition or enrolling a child in school enrichment activities; or it might mean moving to a better apartment or a safer neighborhood.

The Pathways components include an activity diary, a monthly group meeting for welfare recipients, both a monthly case review session and a debriefing session for agency staff, and a computerized tracking system.

The activity diary that Pathways participants receive each month includes space for up to four different activities a participant agrees to do. A central part of the diary is the menu of activities, some of them countable toward the federal work requirement and some of them not countable. The menu includes standard work-prep activities such as job-readiness classes, job search, community work experience, and vocational education, as well as treatment activities such as domestic violence counseling and substance abuse programs. It also includes child-related activities (e.g., taking children to extracurricular activities, going to school conferences, establishing paternity), personal activities (e.g., going to medical appointments, attending a support group), housing and financial activities (e.g., finding a Section 8 apartment, clearing a

debt), and other types of activities that, when structured around a schedule and monitored, can serve as stepping-stones to economic and family stability. Welfare agencies that implement the Pathways System must include a broad range of activities in the diary that goes beyond the standard work-prep activities, though they can add or remove specific activities.

The centerpiece of Pathways is the monthly group meeting, which in most sites around the country is run by a team of welfare caseworkers and employment workers. Each participant gets about 15 minutes to review his or her prior month's plan (which is recorded in the diary) and to negotiate a new plan for the coming month; the new plan builds on recent accomplishments and changing circumstances. The monthly meeting ensures that caseworkers have regular contact with everyone on their caseload and that no one slips between the cracks.

The technological backbone of Pathways is a computerized tracking system that captures information from the activity diaries and monthly group meetings. The system generates a cumulative record of each person's monthly plans, successes, and setbacks. The tracking system can also produce for each participant an easy-to-read copy of his or her own cumulative record.

Staff are supposed to use tracking system data at monthly case review meetings to gauge participant progress and inform decision making. The case review meeting is held within one week of the Pathways group meeting. The Pathways team for each group, along with others who the welfare agency has asked to be present at the case review meeting (such as child welfare staff), together go over the latest information for each welfare recipient and prepare for the next group meeting.

The staff debriefing meeting—a separate meeting—is held within 24 hours of a monthly group meeting. At this gathering, the Pathways team uses a computer-generated checklist to record for each person whether he or she is in compliance with Pathways rules (e.g., attended the monthly meeting, submitted an activity diary); whether he or she is making progress toward individual goals; and whether there are any case actions to be taken during the coming month for the person (e.g., call the SSI liaison, trigger the sanction process).

To fully implement Pathways requires considerable changes for welfare agencies and workers. First, which pathway an individual takes is determined not just by easily identifiable characteristics, but also by level of effort and motivation as evidenced through behavior. With other approaches, work-prep activities are usually determined by personal characteristics. Someone who lacks a high school diploma or GED certificate, for instance, might automatically

be assigned to an education or training program if he or she fails to get a job through up-front job search. In Pathways, assignments are not automatic. There would first be a discussion with the welfare recipient about whether he or she wants to pursue education or training and, if not, what the other options are for fulfilling the work requirement. Say the recipient does decide on an education program. At subsequent meetings, the Pathways team would use all the indicators available to gauge whether the education program was indeed the right choice. Is the recipient attending the program regularly? Is he or she meeting the requirements of the course? If so, the course remains part of the plan. If not, the plan is renegotiated. In Pathways, plans are evaluated every month using actual behavior as a guide.

Second, Pathways staff are asked not to see their role as that of an expert who knows what is best for the welfare recipient, but as a facilitator who helps the welfare recipient set priorities and make good decisions at each step. In training caseworkers around the country for Pathways, we have seen that their prior training and responsibilities have made them more likely to tell welfare recipients what to do, rather than to listen to recipients' concerns and interests and then lay out the options, including the costs and benefits of choosing one option over another. We have found that doing the latter is more likely to foster active decision making on the part of welfare recipients, to instill in them a sense of responsibility for the outcome of the decision, and to communicate respect for them.

The concept of simultaneity is the third important way that Pathways is different from traditional approaches. In Pathways, a welfare recipient would rarely have just one activity as part of the monthly plan. Whenever necessary for an individual, the plan includes an activity that will meet the work requirement, but it is also likely to include one or more activities to address personal or family concerns raised during the meeting, so that welfare recipients become accustomed to juggling responsibilities in all areas of their life. Thus, a monthly plan might include going to a job club, following up on a referral to a doctor for a chronic cough, and arranging a meeting with a school administrator to discuss why a child's learning disability has not been sufficiently addressed.

Fourth, in identifying activities and resources that will help keep welfare recipients and their families moving forward, Pathways staff are asked to go beyond those available through the agency and its established network of service providers. Quite often issues arise during monthly meetings that the agency is not prepared to address—someone wants to join a breast cancer

support group, for example, or needs help navigating the juvenile justice system. For the traditional welfare caseworker, locating these kinds of resources may not be part of the job since they fall outside the system's purview, but in Pathways it is part of the job.

And finally, a word about what Pathways is *not*. It is not a job search program, a life skills class, a treatment program, or any other discrete activity or service that a welfare agency might offer. Rather, it is a case management system for selecting, coordinating, and monitoring activities and services. To use an analogy from the field of education, Pathways serves a "homeroom" function, a place for regular and frequent check-in where ongoing assessment and planning take place and where guidance, feedback, and support are available. When the "bell rings," everyone heads off to their own activities and services for the month, just as students head off to their own schedule of classes for the day.