



Developing a Performance Management System to Promote Client Service Delivery

PRESENTED BY THE CALIFORNIA DEPARTMENT OF SOCIAL SERVICES

Presenters

- **Natasha Nicolai**, CalWORKs and Child Care Branch Chief
- **Julianna Vignalats**, CalWORKs Process Improvement and Performance Section Chief

Today's Agenda

- Cal-OAR Background
- Cal-OAR Design Process
- Performance Measures and Data
- CalWORKs Continuous Quality Improvement (Cal-CQI)
- Development and Implementation Challenges
- Training/Technical Assistance Approach
- Cal-OAR Website and Available Resources

What is the CalWORKs Outcomes and Accountability Review (Cal-OAR)?

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.

Cal-OAR is designed to promote **critical reflection** of the CalWORKs program in order **to better engage CalWORKs clients**.

Three Core Components

- Performance Measures
- CalWORKs County Self-Assessment (Cal-CSA)
- CalWORKs System Improvement Plan (Cal-SIP)

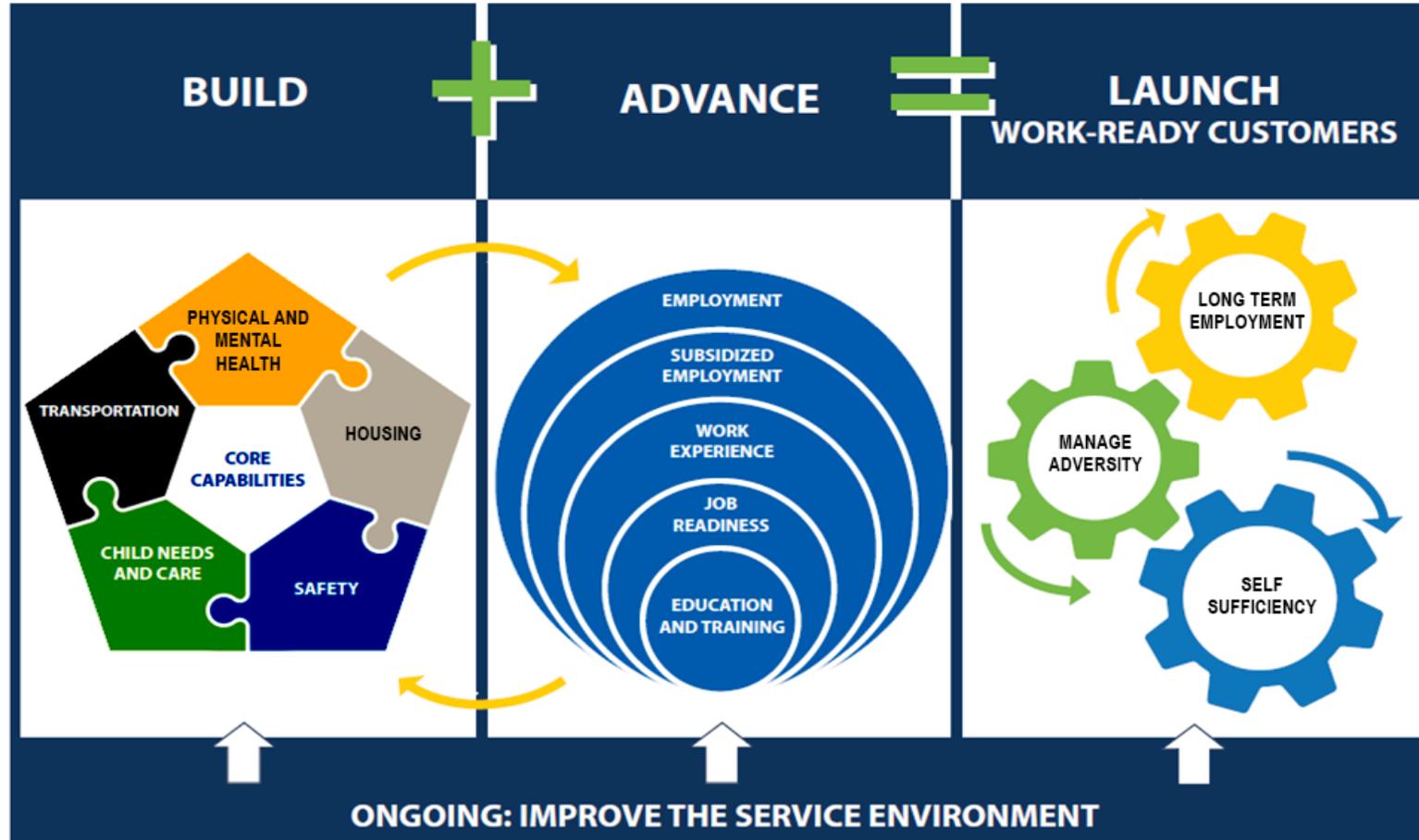
Cal-OAR is structured...

- In three-year cycles...
- A Cal-CSA, Cal-SIP, and Progress Report are submitted by counties once every three-years.

What prompted Cal-OAR?

The Spirit & Intent of Cal-OAR

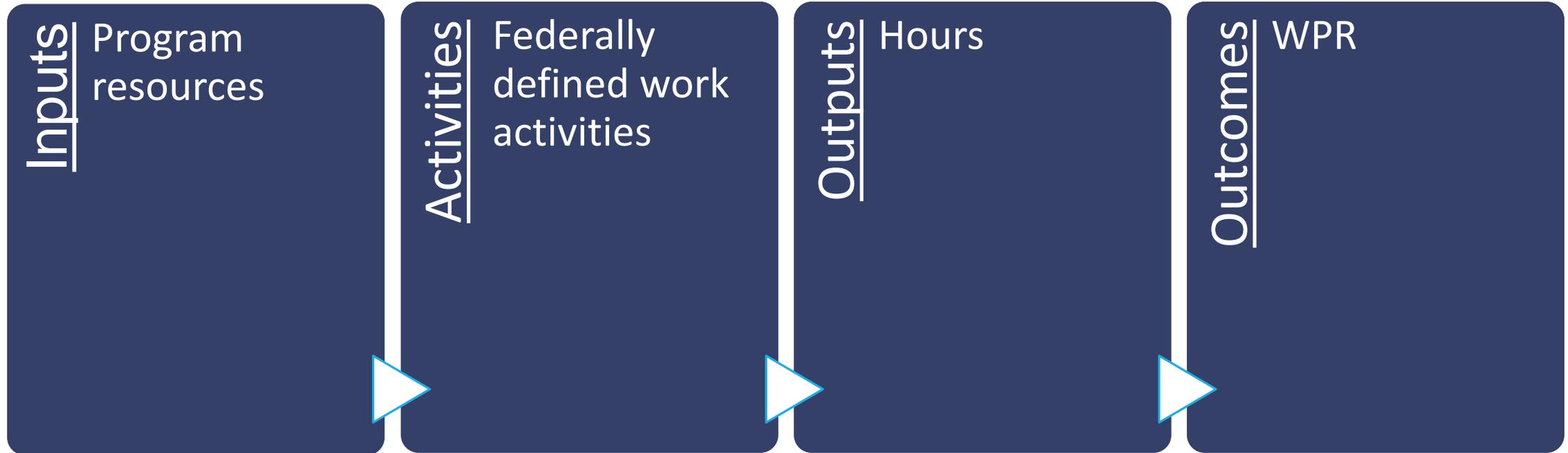
**INTENTIONAL SERVICE SELECTION:
THE RIGHT SERVICES FOR THE RIGHT CLIENTS**



CaIWORKs Theory of Change

- Effective engagement
- Meaningful goals
- Executive function and self-regulation
- Positive, supportive relationships
- Program innovation
- An evidence-based framework

How Outcomes Drive Program Logic



How Outcomes Drive Program Logic



Cal-OAR Legislation

In 2017, state statute: required CDSS to convene a stakeholder workgroup to develop Cal-OAR, prescribed key components of Cal-OAR, and timeframes for implementation.

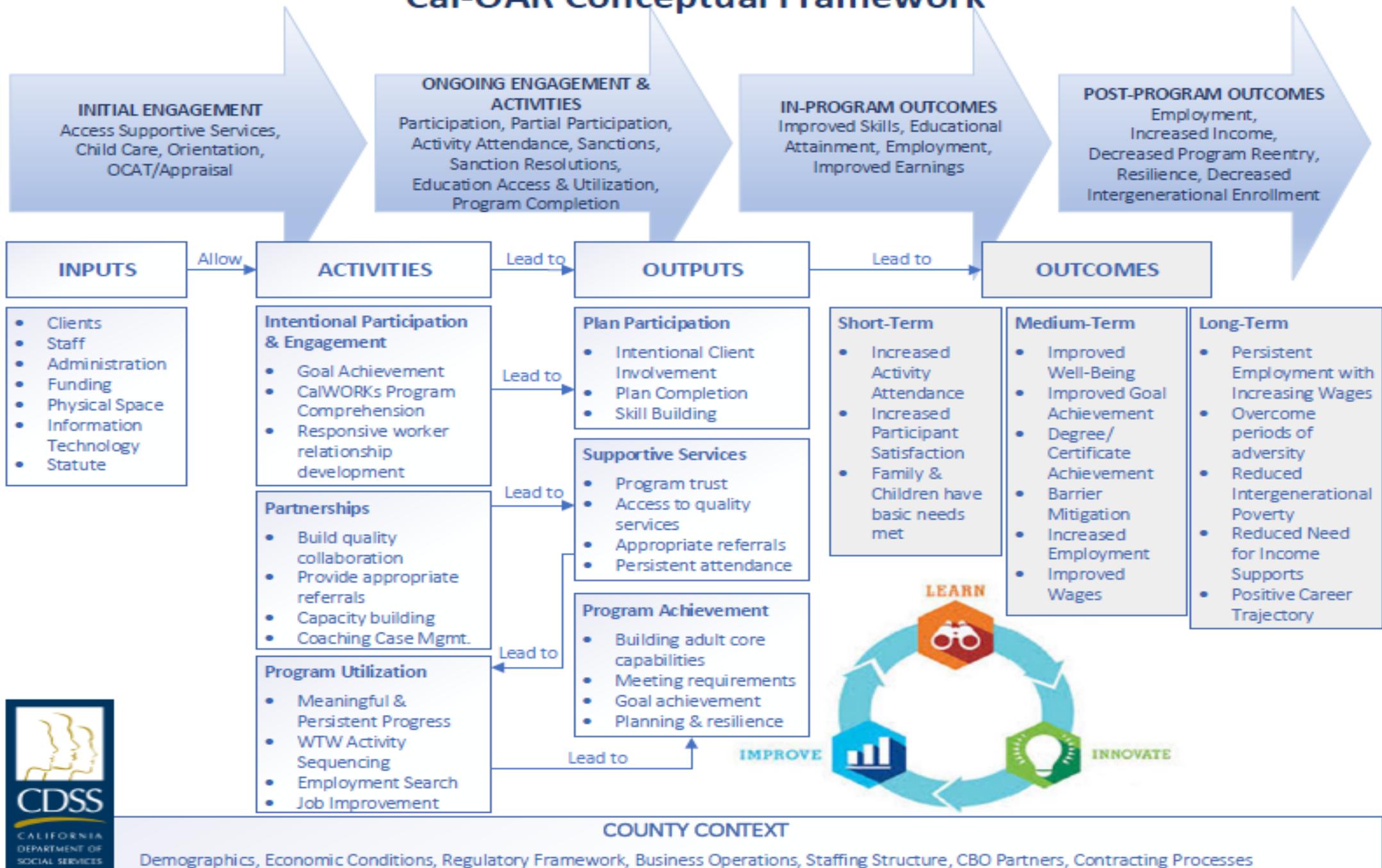
[CA Welfare and Institutions Code Section 11523](#)

Cal-OAR Design Process

Cal-OAR Stakeholder Workgroup

- Collaborative process with stakeholders
- Develop structure and substance of Cal-OAR
- Ongoing
 - Refine process
 - Performance measure thresholds and revisions

Cal-OAR Conceptual Framework



Accountability vs. Program Management

Accountability (outcome)

- State defined at a high level across all counties
- Medium to long term

Program management (process)

- Short term
- Observable, actionable, and easy to interpret
- Inputs and activities
- Steps between inputs and outcomes

Performance Measure Development

Measures must be...

- Prioritized
- Connected to design, data sources, and use
- Focused on outcomes the program *affects*
- Balanced and comprehensive

Implementation must be considered

Criteria for Selecting Measures

Performance measures should be...

- Quantitative
- Timely
- Actionable
- Standardized
- Understandable
- Minimally burdensome

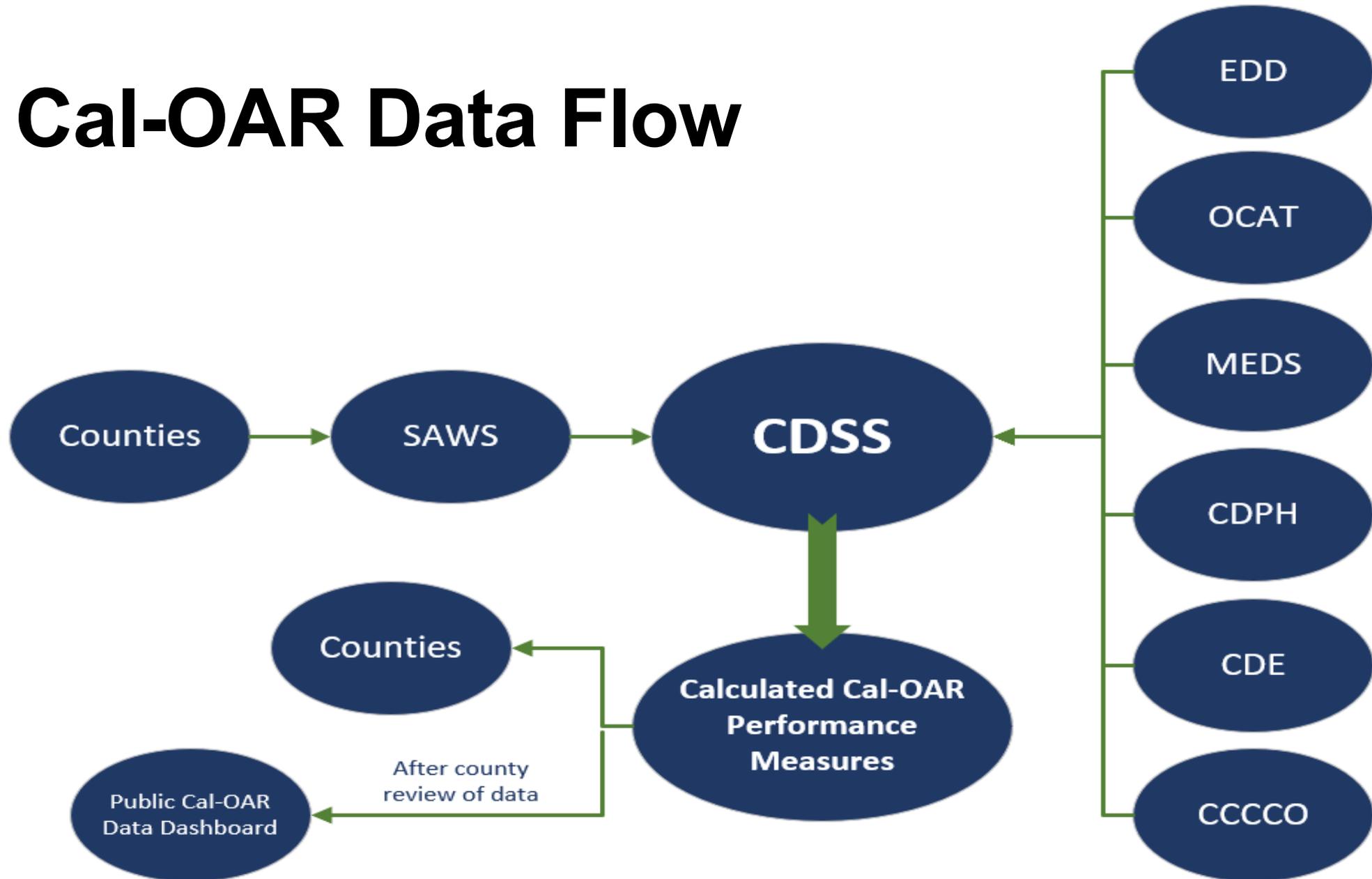
Performance Measures and Data

Cal-OAR Performance Measures

Performance measures align with these categories.....

- Participant engagement
- Service delivery
- Participation
- Employment
- Educational attainment
- Program exits
- Program reentries
- Family and child well-being

Cal-OAR Data Flow



Example: Post CalWORKs Employment Rate

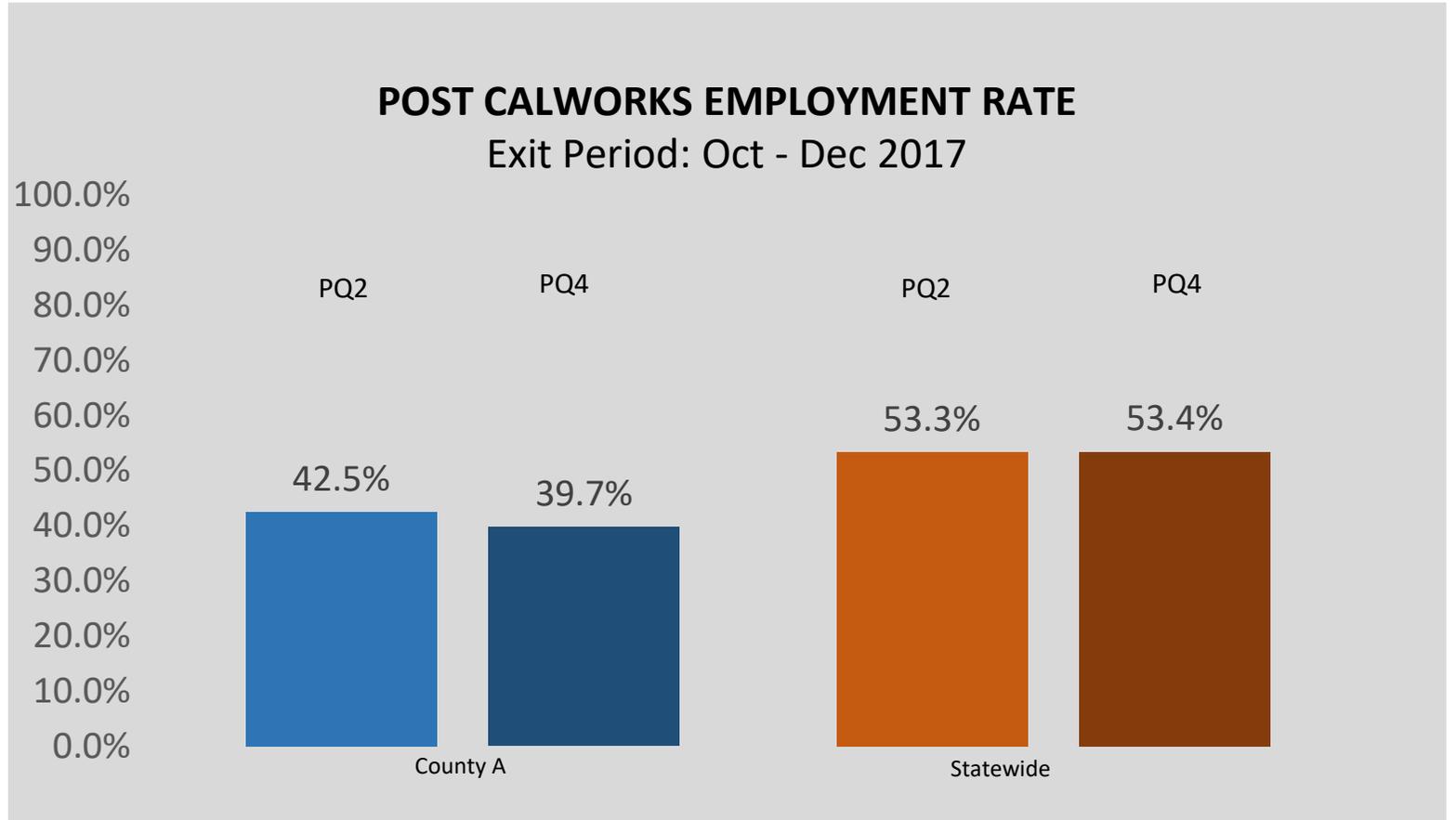
Numerator: Of the Denominator, former Welfare-to-Work individuals with wages in the measurement quarter

Denominator: Welfare-to-Work individuals that exited CalWORKs within the exit cohort period

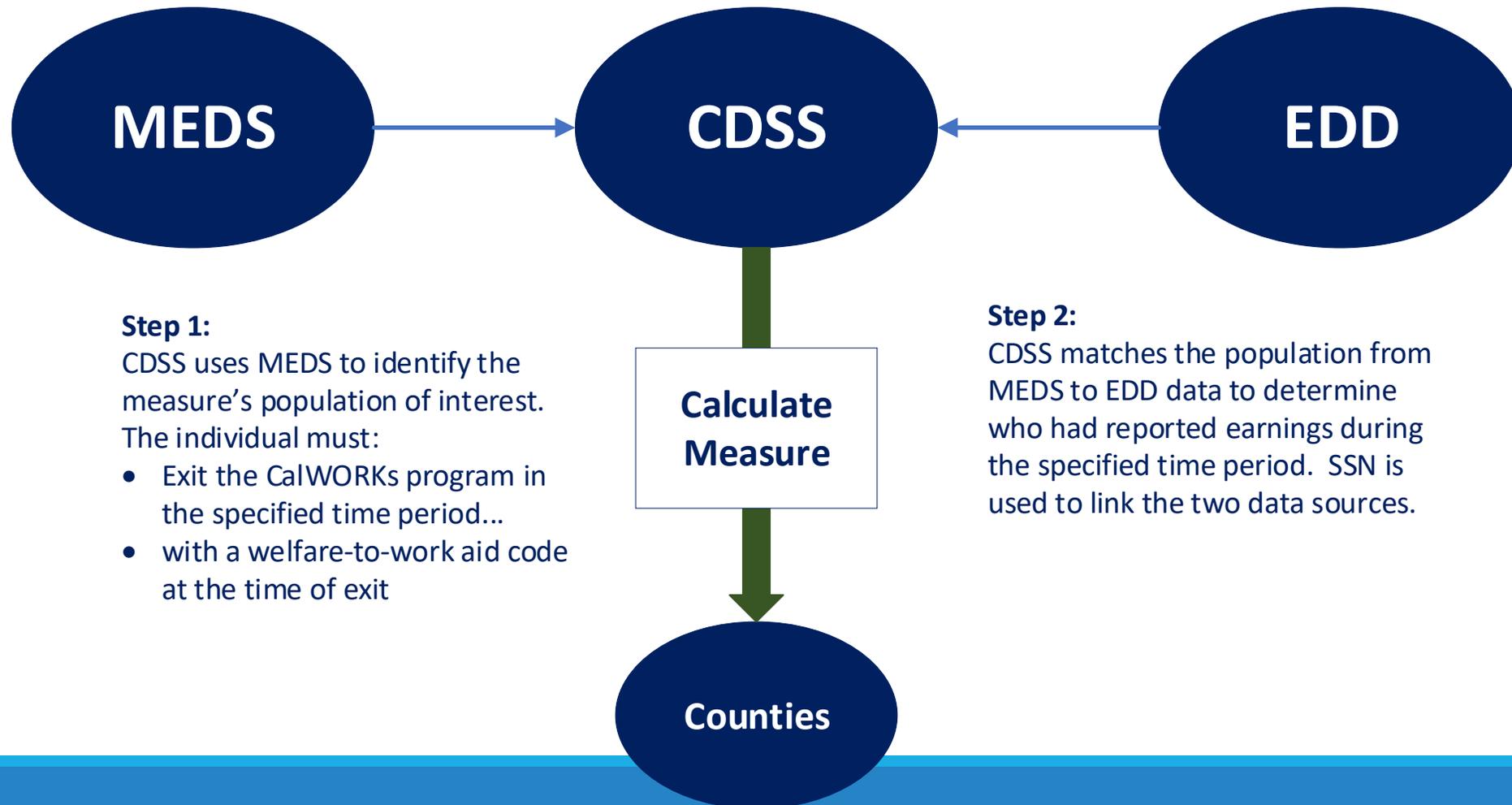
Data Sources: Medi-Cal Eligibility Determination System and Employment Development Department

Measure Visualization:

Post CalWORKs Employment Rate



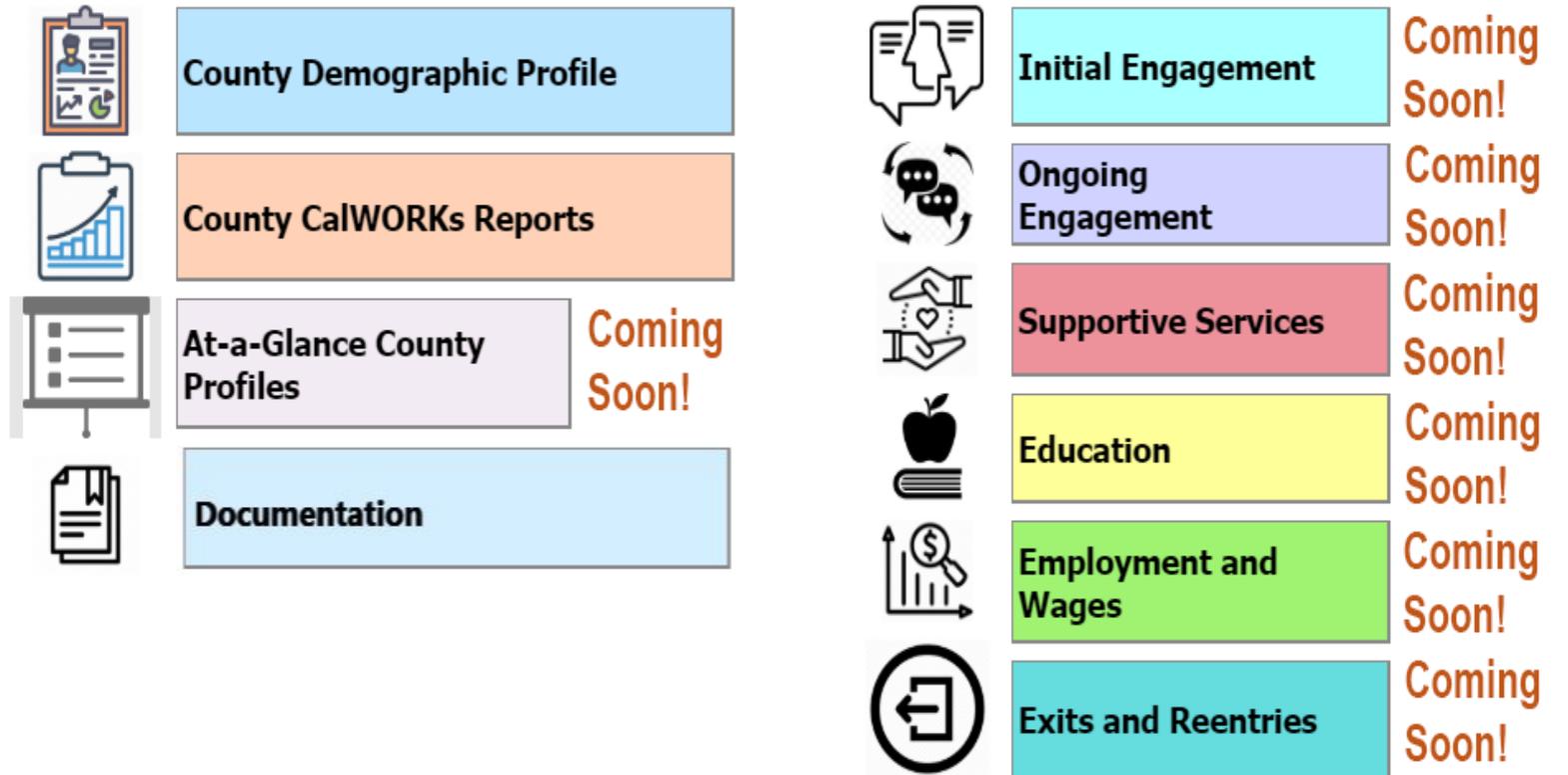
Data matching: Post CalWORKs Employment Rate



Drawing out Data Narratives:

Cal-OAR Data Dashboard

CalWORKs Outcomes and Accountability Review (Cal-OAR) Dashboard



County Demographic Profile



Average Unemployment & Unemployment Rate

Educational Attainment & Median Earnings

Household Income

Poverty and Deep Poverty Rates

Average Rent

Race and Ethnicity



Average Unemployment and Unemployment Rate*

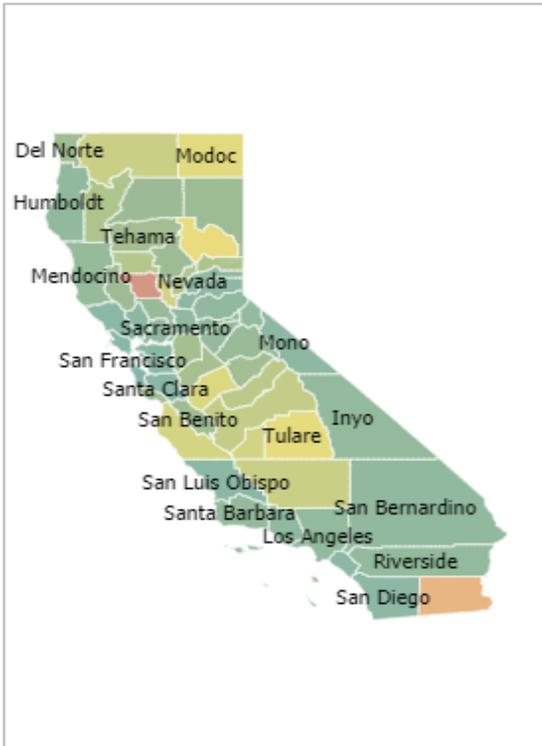


Year: 2019

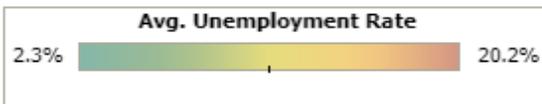
County: Los Angeles

Year: 2009 - 2019

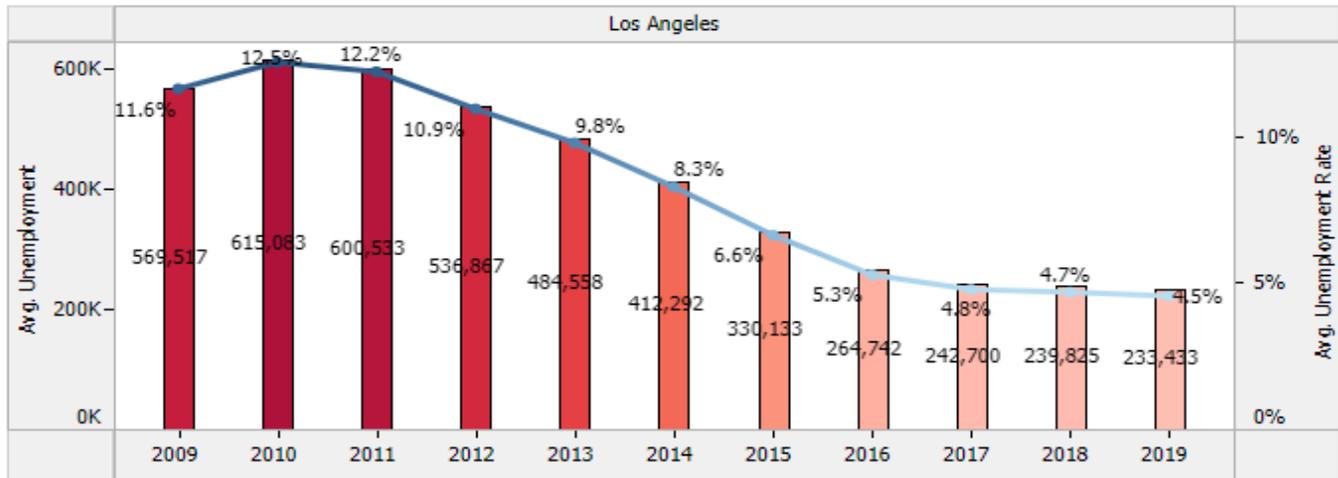
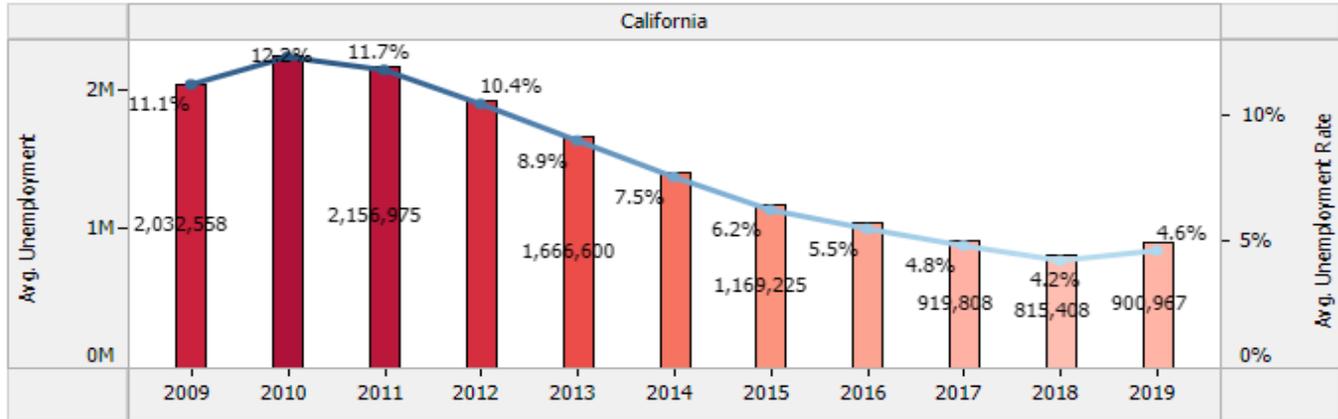
2019 Average Unemployment



* Employment Development Dept. (EDD)



Average Unemployment and Unemployment Rate



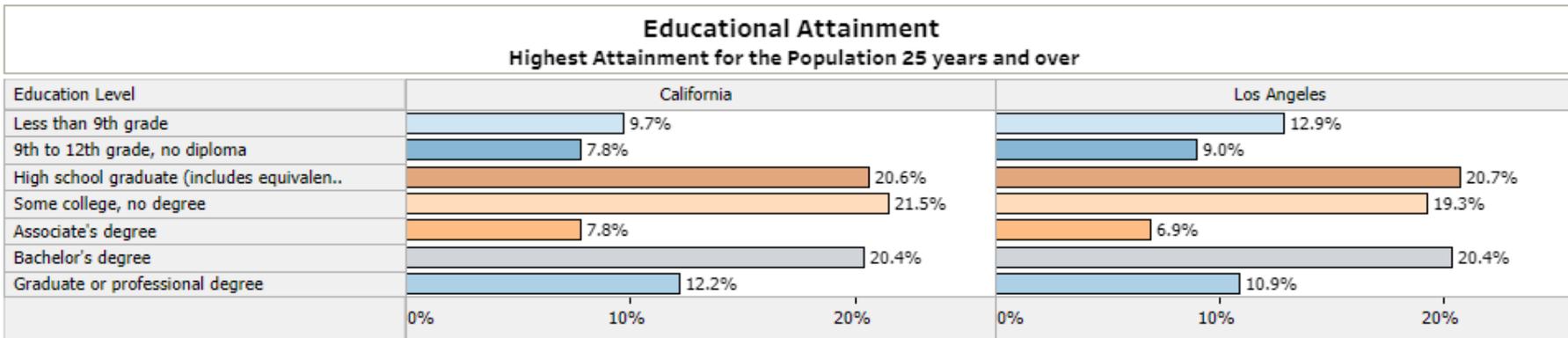
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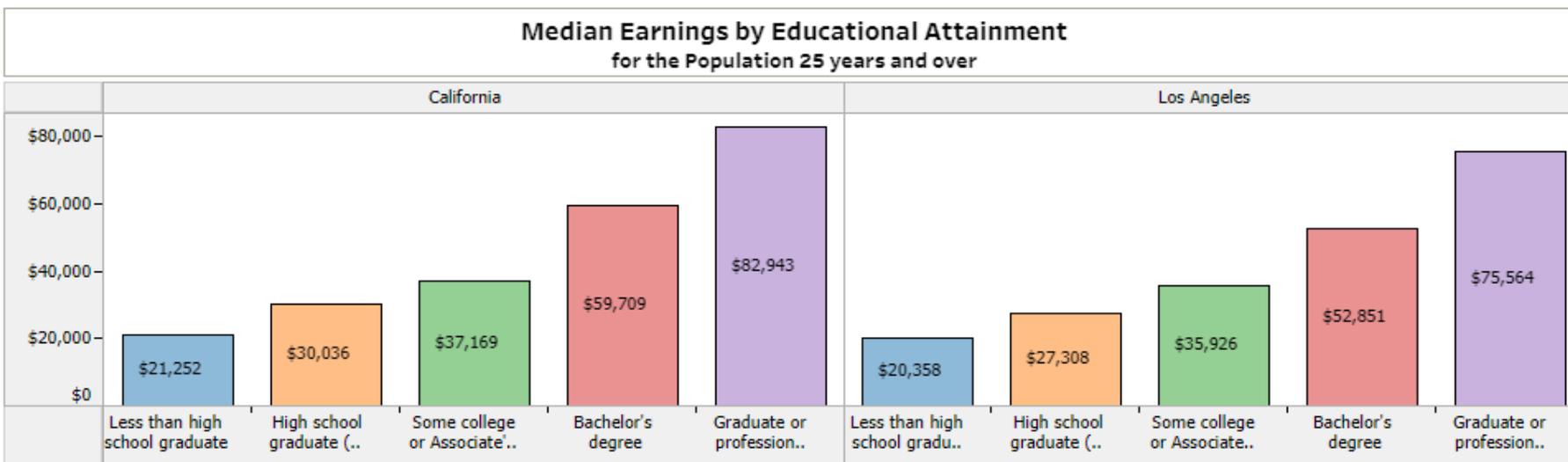
Educational Attainment and Median Earnings*



County (Multiple values) ▼



*2013-2017 American Community Survey (5-year estimates), Social Characteristics, Table DP02



*2013-2017 American Community Survey (5-year estimates): Educational Attainment, Table S1501

County CalWORKs Reports

CalWORKs Caseload by Case Type

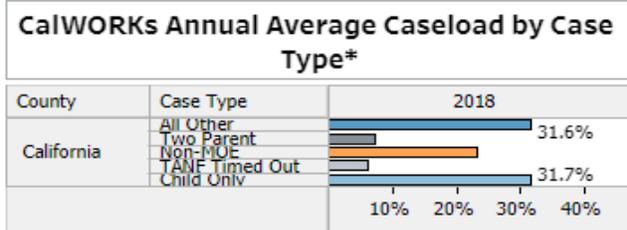
Welfare-To-Work Activity Participation

Primary Language Spoken

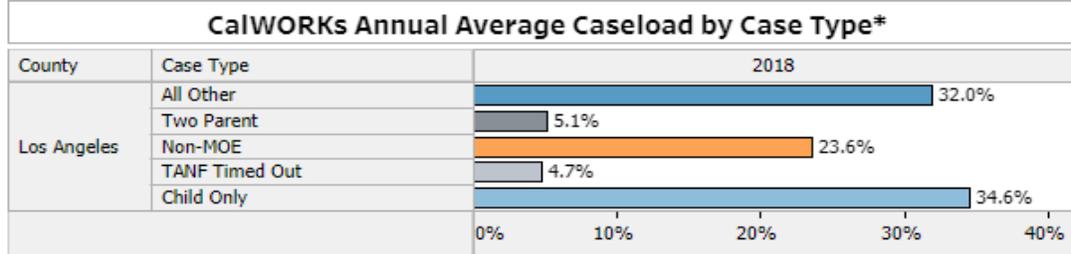
County: Los Angeles

Year: 2018

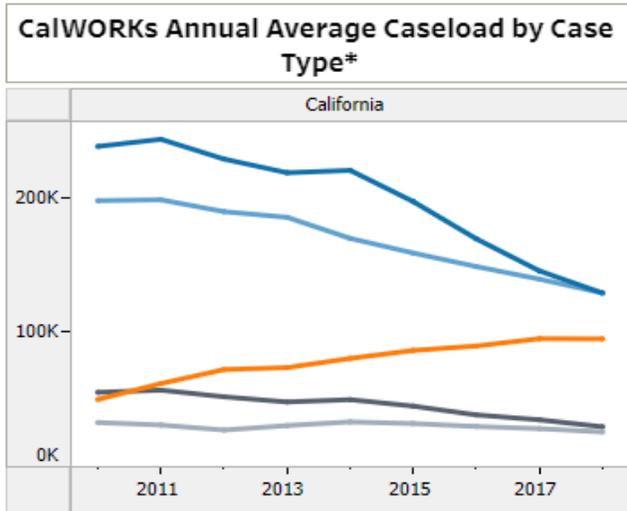
Case Type: (All)



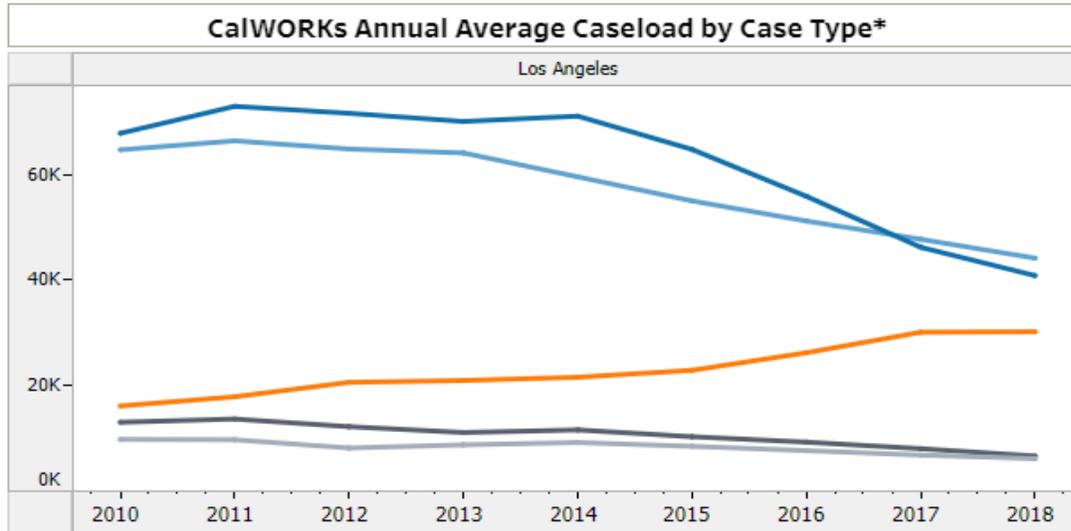
* Data from CA 237CW, Item 8A: Total cases receiving cash grant (\$10 or more)



* Data from CA 237CW, Item 8A: Total cases receiving cash grant (\$10 or more)



* Data from CA 237CW, Item 8A: Total cases receiving cash grant (\$10 or more)



* Data from CA 237CW, Item 8A: Total cases receiving cash grant (\$10 or more)

Case Type: All Other (dark blue), Child Only (light blue), Non-MOE (orange), TANF Timed Out (grey), Two Parent (black)

County CalWORKs Reports



CalWORKs Caseload by Case Type

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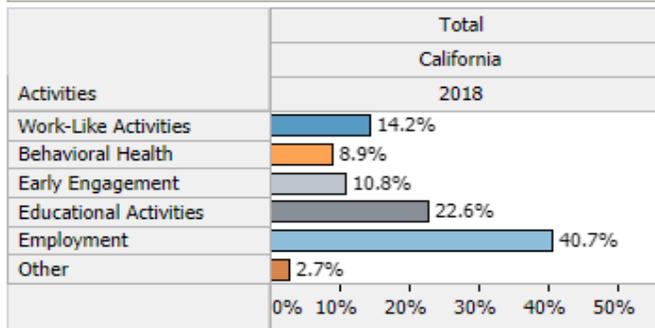
Year: 2018

Activities: (All)

Case Type: Total



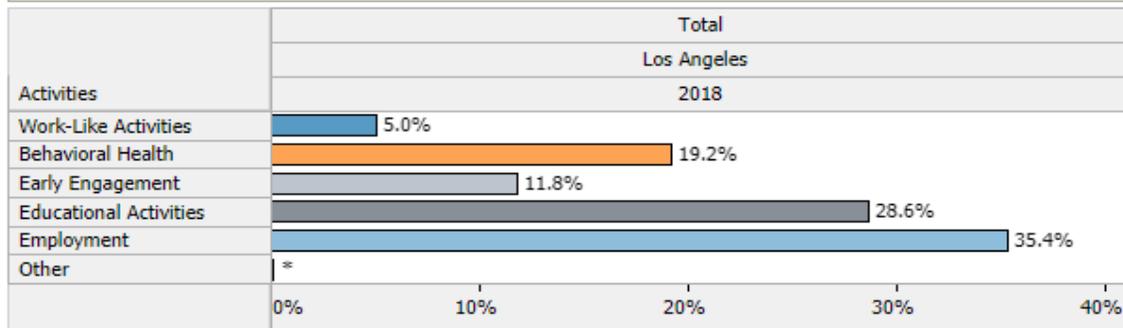
Welfare-To-Work Activity Participation*



* Data from WTW25/25A.

Note: Activity participation does not equal number of individuals since participants may be counted in multiple activities.

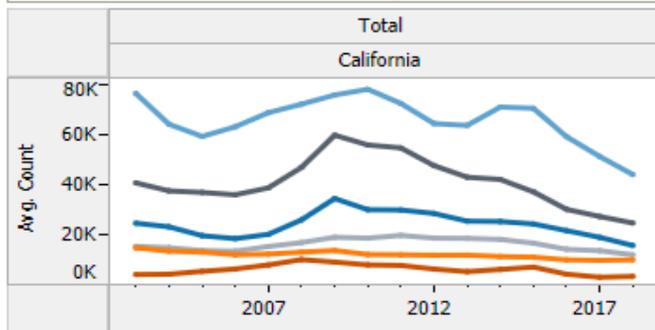
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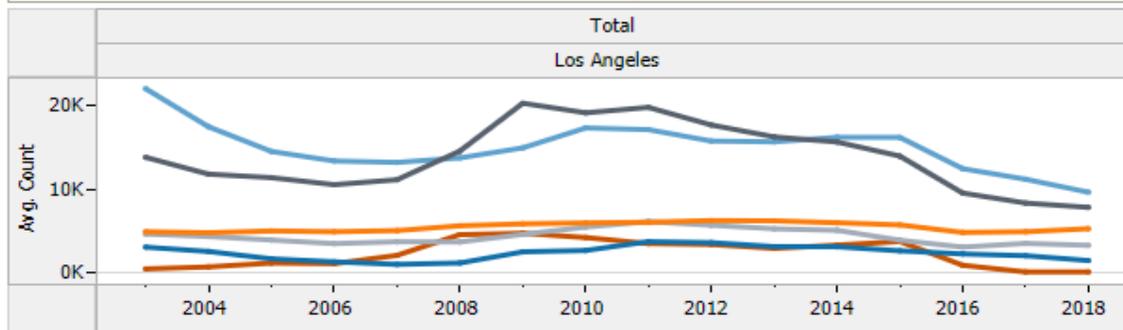
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Activities

Work-Like Activities

Behavioral Health

Early Engagement

Educational Activities

CalWORKs Continuous Quality Improvement (Cal-CQI)

Cal-CQI Process



CQI moves us through a logical process to ask...

How are we doing?

What can be done better?

County Self-Assessment (Cal-CSA)

- Comprehensively assess county CalWORKs program
- Identify strengths and challenges
- Describe how local operational decisions and systemic factors affect outcomes

Cal-CSA Template

- Automated template to guide counties through the analytical process in a stepwise manner
- Pre-populated with demographic and performance measure data
- Same required analytical questions for all counties
- Optional analytical questions depending on county's unique situation (context) and performance measure rates

Cal-CSA Analysis

Sample Cal-CSA Analytical Questions

Describe the strengths and needs of the communities served.

The number and locations of CalWORKs offices. Specify urban versus rural. For each office specify: operations, service array, and other services offered (i.e. other human service or workforce programs).

What service/partnership gaps currently exist? What impact does that have on service delivery, and what strategies or long-term plans does the county have to address these gaps?

Discuss the client's experience at the CalWORKs office, include: average wait time, security, paly area for children, etc.

Are any barrier removal service providers co-located at county offices; describe.

Explore whether measure performance varies by key demographic points.

Outcomes are often related – practice changes that lead to improvement in one measure may impact the county's performance on other measures. What other performance measures might impact these measures?

Example: Post CalWORKs Employment Rate

Sample Cal-CSA Analytical Questions specific to Employment Related Measures

Describe the county's process for engaging employed WTW clients. What does case management look like for employed clients, and how does it differ from case management for unemployed clients?

What percentage of employed CalWORKs clients have unsubsidized employment, subsidized employment, and self-employment?

Describe the county's partnerships with local labor boards.

How do former clients' median earnings compare to the overall county population's median earnings?

Compare former clients' median earnings to the federal poverty threshold, the California poverty measure, and the county living wage.

Describe the county's post aid job retention services, if applicable, and what are the most common services utilized.

System-Improvement Plan (Cal-SIP)

- County plan for improving their CalWORKs program
- Performance measures for focused improvement
- Improvement strategies

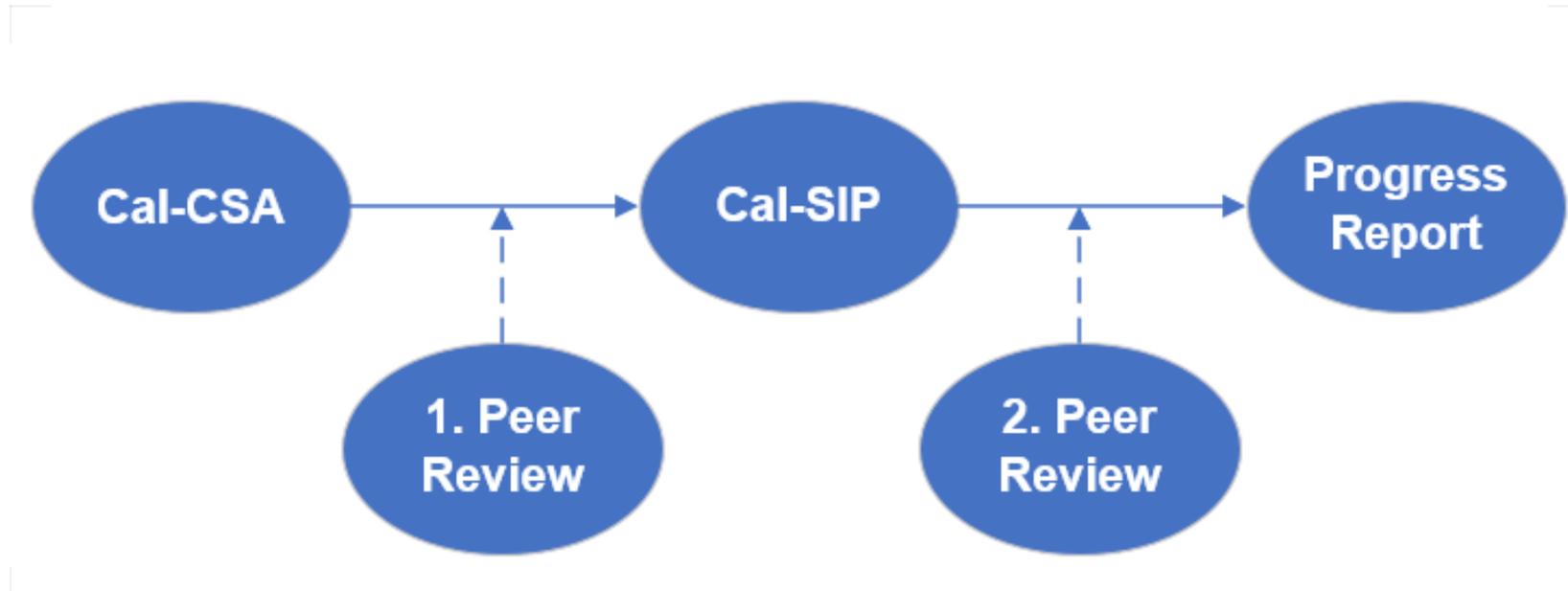
Progress Report

- Update on performance measures and strategy implementation
- Success and barriers in reaching performance goals
- Identification of strategy adjustments

Cal-OAR Peer Review

- Share promising and best practices
- Discuss and brainstorm ideas to innovate and refine county CalWORKs programs
- Discuss successes and challenges
- Troubleshoot road blocks
- Develop solutions with peer counties

Cal-OAR Peer Review



Development and Implementation Challenges

Challenges and Strategies to Overcome

- Desire to measure everything; competing stakeholder priorities
- Reconciling service delivery culture change with WPR
- Need for external data – data sharing agreements
- Data validity
- Data de-identification
- Internal CDSS and External county staff capacity

Training/Technical Assistance

County Technical Assistance/Training roadmap

- Webinars
- Cal-OAR Forums
- CalWORKs Training Academy
- In-Person Regional Training
- One-on-One Coaching and Support

Cal-OAR Website and Resources

Available Resources

Cal-OAR website

<https://www.cdss.ca.gov/inforesources/CalWORKs/Cal-OAR>

Cal-OAR performance measures

https://www.cdss.ca.gov/Portals/9/ACL/2019/19-40_3.pdf?ver=2019-05-31-132510-040

Cal-OAR data dashboard

<https://www.cdss.ca.gov/inforesources/CalWORKs/Cal-OAR/Cal-OAR-Data-Dashboard>

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Question and Answer

