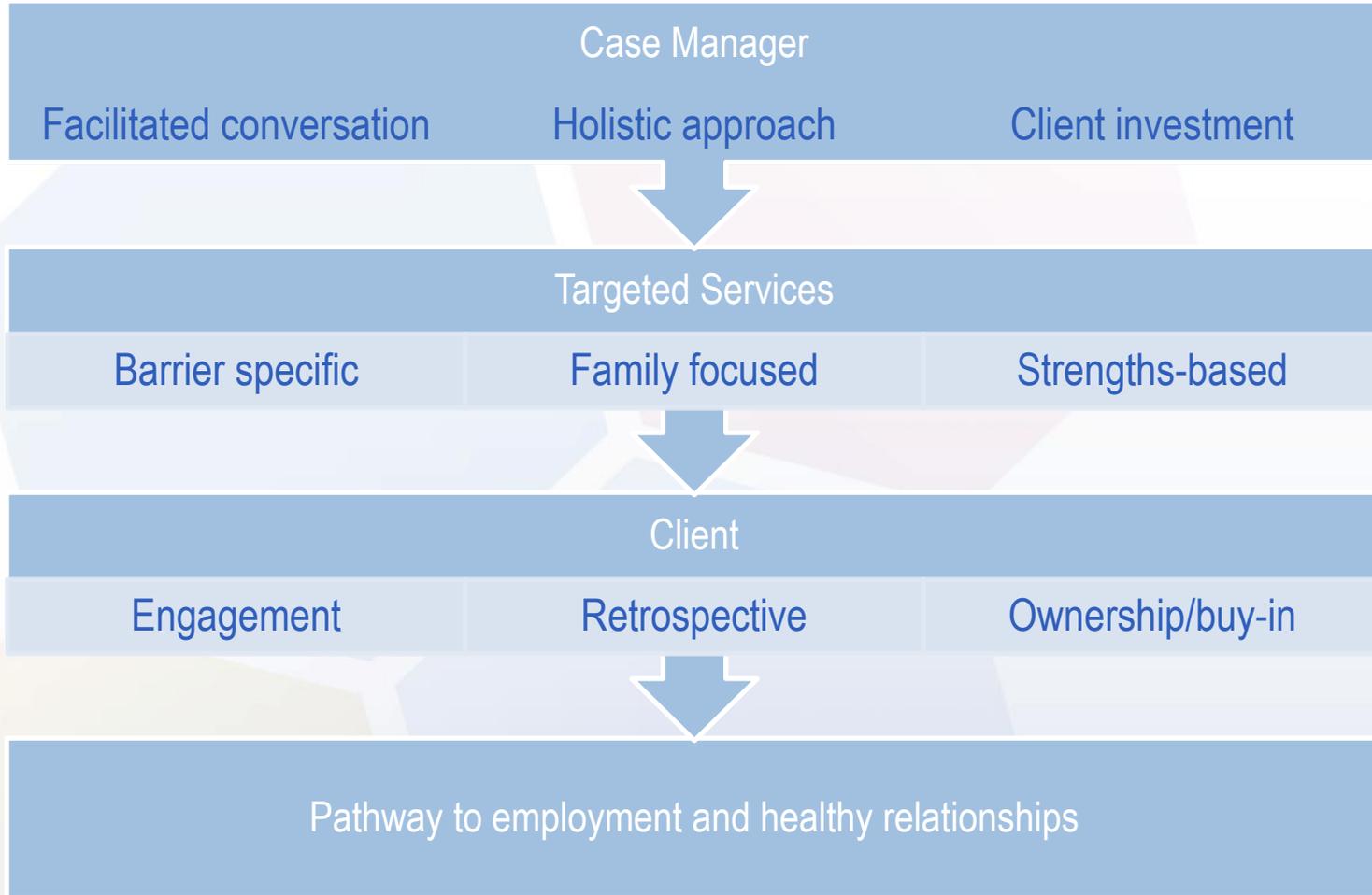# Using the Online Work Readiness Assessment as a Platform for Developing a Tribal TANF Data and Reporting System

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Agenda

- Introductions

- Overview/background of OWRA

- OCAT Implementation – The California Experience

- Early lessons learned from OCAT

Benefits of Comprehensive Screening

Case Manager

| Facilitated conversation | Holistic approach | Client investment |

Targeted Services

| Barrier specific | Family focused | Strengths-based |

Client

| Engagement | Retrospective | Ownership/buy-in |

Pathway to employment and healthy relationships

- Maintains consistency and ensures accountability among case managers
- Provides more detailed information about the needs of the families in the system
- Informs leadership about gaps in supportive services that are available
- Provides detailed information to guide employment planning and education and training opportunities for TANF participants
- Facilitates connections to workforce trends and labor market needs

OWRA Facts

- Initiated from the field starting with Maryland

- Reflective of lessons learned and pilot testing

- Web-based suite of resources, tools, and assessments that have been merged into a single tool

- 5 modules (Intake, Assessment, Self Sufficiency Plan, Labor Market/Employment Analysis, Reporting)

- Identifies individual barriers but strength-focused

- Stand alone but also ability to connect with eligibility systems

- Allows case workers to establish action steps and referrals to work activities and supportive services for clients

Reception

Program Screening and Eligibility Determination

Intake

Work Readiness Interview

Assessment

Assess Strengths and Barriers

Customized Rules

Self-Sufficiency Plan

Employment Plan
Training Plan
Barrier Reduction
Supportive Services

Self-Sufficiency Plan
Summary & Referrals

Labor Market/Employment Analysis

Occupation Analysis

Reporting

Monitor Plan, Evaluate Progress, Manage, and Adjust

Demographics
Barriers
Referrals
Work Activities

Work Readiness Resources

For Case Manager

For Participants

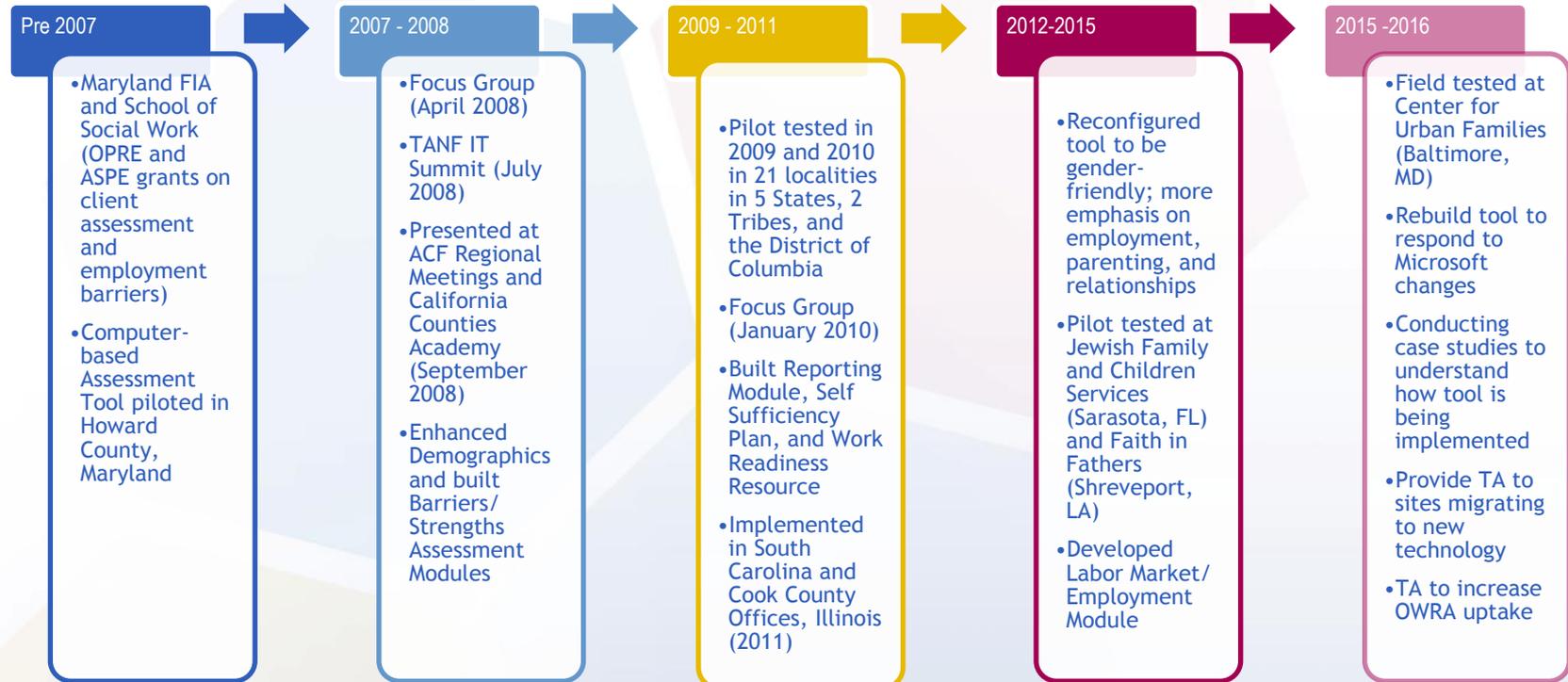Assessments (e.g. COPES, CAPES, Work Keys)

Workforce (e.g. One-Stop, ONET)

Employment Projections

Career Navigator

Self and Career Exploration

Career Portfolio
Tips/Tutorial for Career Advancement

OWRA Modules

Intake	Assessment	Self-Sufficiency Plan (SSP)	Labor Market Analysis	Reporting
Data is collected on client demographics, employment and educational background, household composition, and finances.	Data is collected on the potential strengths and barriers to employment for individuals in a comprehensive manner. The information collected serves as the foundation for assessing work readiness for the SSP.	The SSP highlights client strengths, suggests recommendations for reducing client barriers, and allows for and provides customized referrals for employment opportunities and barrier reduction. A portal of Work Readiness Resources is available to help caseworkers and participants explore resume writing, soft skill development, interests, abilities, and labor market information.	The Labor Market Analysis provides participants with state and local labor market information for occupations in line with their educational backgrounds, interests, and skills.	This module streamlines business processes by providing aggregated information over a specified period of time about client population demographics, employment and education history, barriers, and career preferences. Enables organizations to make data-based decisions about referral strategies, services, partners, and programs based on client needs.

OWRA Timeline

Pre 2007
- Maryland FIA and School of Social Work (OPRE and ASPE grants on client assessment and employment barriers)
- Computer-based Assessment Tool piloted in Howard County, Maryland

2007 - 2008
- Focus Group (April 2008)
- TANF IT Summit (July 2008)
- Presented at ACF Regional Meetings and California Counties Academy (September 2008)
- Enhanced Demographics and built Barriers/ Strengths Assessment Modules

2009 - 2011
- Pilot tested in 2009 and 2010 in 21 localities in 5 States, 2 Tribes, and the District of Columbia
- Focus Group (January 2010)
- Built Reporting Module, Self Sufficiency Plan, and Work Readiness Resource
- Implemented in South Carolina and Cook County Offices, Illinois (2011)

2012-2015
- Reconfigured tool to be gender-friendly; more emphasis on employment, parenting, and relationships
- Pilot tested at Jewish Family and Children Services (Sarasota, FL) and Faith in Fathers (Shreveport, LA)
- Developed Labor Market/ Employment Module

2015 -2016
- Field tested at Center for Urban Families (Baltimore, MD)
- Rebuild tool to respond to Microsoft changes
- Conducting case studies to understand how tool is being implemented
- Provide TA to sites migrating to new technology
- TA to increase OWRA uptake

Research and Tool Development | **Hearing from the Field** | **Responding to the Field**

Cases: 535,000

Individuals: 1.3 Million

Children: 1 Million

- A customized, online, standardized statewide appraisal tool that, when coupled with proper interviewing skills:

  – Assists case managers with helping clients access services and an appropriate employment pathway

  – Provides comprehensive client information

  – Standardizes the appraisal process

  – Streamlines work and WTW readiness planning activities

- Provides in-depth appraisal of client strengths and barriers

- For use with CalWORKs welfare-to-work clients

- **Mandated by Law**
- **Promotes:**
  - Early program engagement
  - Early strength and barrier identification
- **Standardizes:**
  - Strength and barrier identification
  - Client experience

Questionnaire
- **Demographics**
- **Employment**
- **Education**
- **Housing**
- **Transportation**
- **General Health**
- **Emotional & Mental Health**
- **Substance Use**
- **Domestic Abuse & Safety**
- **Pregnancy**
- **Child Care & Parenting**
- **Relationships**

Recommendations
- **Family Stabilization Evaluation**
- **Recommendations (Work, Education and/or Barrier Removal)**
- **Strengths**
- **WTW Exemption/ Exception and Program Waiver Evaluation**

Appraisal Summary and Recommendations
- **Client and Case Information**
- **Household Composition**
- **Finances/Benefits/ Payments**
- **Strengths & Barriers Summary**
- **Appraisal Recommendations & Next**

Reports
- **Aggregated information about client population demographics, employment and interests, education, and barriers.**
- **Enables information-based programming and referral decisions.**

Work Readiness Resource
- Clients – learn and explore their interests, abilities, and skills
- Case Managers –hub of information, resources, and tools

What makes OCAT different?

- Interactive (responses to questions inform follow-on questions that are asked)

- Essential to use Motivational or Rapport-building interviewing techniques

- Recommendations are generated based on responses, standardized throughout state
    - An Action Plan feature enables customization of Recommendations based on county service providers or client preferences or needs

History of OCAT Implementation

Summer 2013 Legislation mandates "standard appraisal tool"

Spring 2014 Stakeholder Engagement

Fall 2014 OCAT Pilot Testing

Spring 2015 OCAT Released

Spring and Summer 2015 Statewide Training Implemented

Fall 2015 Phase 1 Learning Center Launched

Today Over 75,000 clients assessed (as of July 11, 2016)

- Part of welfare-to-work flow

Determined eligible for CalWORKs → **Referred to welfare-to-work** → **Program Orientation** → **Appraisal [OCAT]**
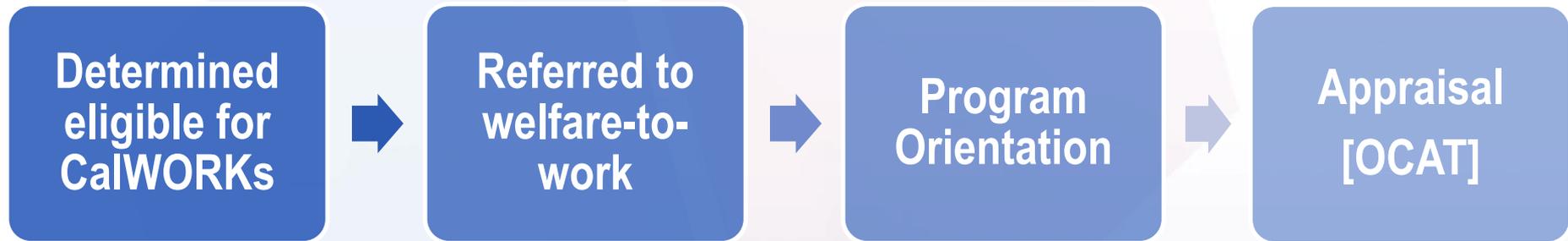
Job Search and/or Employment

Mental Health, Substance Abuse, Domestic Abuse Services

Welfare-to-Work Plan

Family Stabilization

Assessment for Education

- Fully Implemented in all 58 California counties
    - Train the Trainers for over 250 staff held in Spring/Summer 2015
    - Implementation started in May of 2015 with statewide roll-out in Fall 2015
    - Over **75,000** appraisals completed (as of July 11, 2016)

Quick View of OCAT - Demographics

Quick View of OCAT - Employment

OWRA Online Work Readiness Assessment

Interview #5289380 for applebomb, melissa

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Return to Interview List

- ◑ Demographics
- ◑ Employment (Section A)
  - ● Current Activities (A1)
  - ○ Reasons Not Working (A2)
  - ○ Job History (A3)
  - ● Work Experience and Interests (A4) ▷
  - ○ Legal Barriers (A5)
- ○ Education (Section B)
- ○ Housing (Section C)
- ○ Transportation (Section D)
- ○ General Health (Section E)
- ○ Emotional and Mental Health (Section F)
- ○ Substance Use (Section G)
- ○ Domestic Abuse - Safety (Section H)
- ○ Pregnancy (Section I)
- ○ Child Care and Parenting (Section J)
- ○ Relationships (Section K)

Employment (Section A)

Work Experience and Interests (A4)

Instructions: Probe for interest and experience in the following job types. Each category does not have to be read aloud.

Thinking about all the work you have ever done, whether at a job or through community service, what is your level of skill and interest in the following types of jobs?

Job Type	Skill Level			Does this type of work interest you?	
Administrative Assistant (typing, data entry)	○ Advanced	○ Basic	○ None	○ Yes	○ No
Bookkeeping or accounting	○ Advanced	○ Basic	○ None	○ Yes	○ No
Call Center	○ Advanced	○ Basic	○ None	○ Yes	○ No
Caring for others (children, the elderly, those with disabilities, or those with illness)	○ Advanced	○ Basic	○ None	○ Yes	○ No
Cleaning/Custodial work	○ Advanced	○ Basic	○ None	○ Yes	○ No
Construction	○ Advanced	○ Basic	○ None	○ Yes	○ No
Customer Service	○ Advanced	○ Basic	○ None	○ Yes	○ No
Dental hygienist or other dental occupations	○ Advanced	○ Basic	○ None	○ Yes	○ No
Driving (truck, taxi, buses, limo, fork lift)	○ Advanced	○ Basic	○ None	○ Yes	○ No
Education	○ Advanced	○ Basic	○ None	○ Yes	○ No
Entertainment (music, theater, film)	○ Advanced	○ Basic	○ None	○ Yes	○ No
Farming (e.g., ranching, dairy services, and produce pickers)	○ Advanced	○ Basic	○ None	○ Yes	○ No
Fishing or hunting for commercial or community use	○ Advanced	○ Basic	○ None	○ Yes	○ No
Harvesting local resources (e.g., timber, local product manufacturing)	○ Advanced	○ Basic	○ None	○ Yes	○ No
Healthcare (nursing, health aide, medical assistant,	○ Advanced	○ Basic	○ None	○ Yes	○ No

OWRA
Online Work Readiness Assessment

- Fully Implemented in all 58 California counties
  - Train the Trainers for over 250 staff held in Spring/Summer 2015
  - Implementation started in May of 2015 with statewide roll-out in Fall 2015
  - Over **67,543** appraisals completed (as of June 3, 2016)
  - Ongoing Technical Assistance and county coaching, including bi-weekly all-county calls to provide updates and foster information exchange between counties

What is Needed for Successful Appraisals?

- Case manager role suitability

- Manage client expectations

- Motivational or rapport-building interviewing techniques

- Reliable internet connection

- Appointment time – 45 minutes to 1 hour

- Private space to conduct interviews

- Service provider referral infrastructure for follow through

Organization

- Build capacity
- Provide infrastructure for ongoing support
- Determine business process flow
- Conduct referral asset mapping

Leadership

- Manage change
- Identify staff training needs
- Allow time for transition
- Emphasize long-term benefits
- Monitor program and tool use reporting data

Questions?

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