



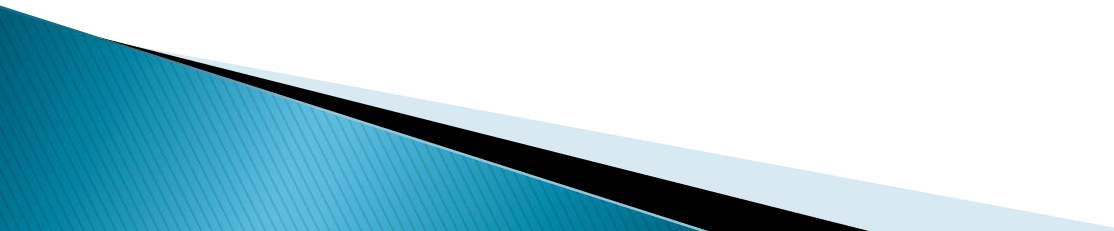
July 26, 2016

Stanislaus Demographics

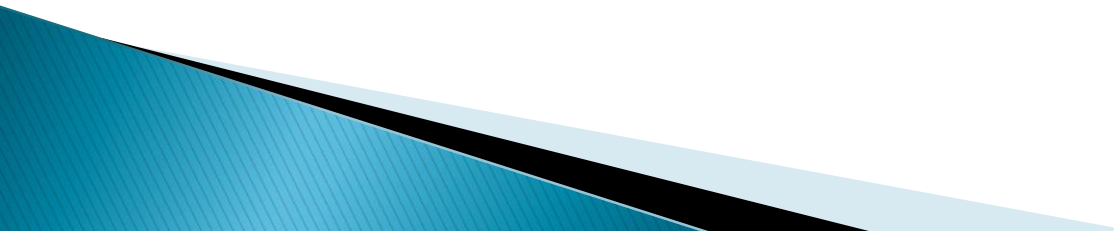
- ▶ Approximately 515,000 residents
- ▶ Average 3,400 WTW Enrolled Customers
- ▶ Unemployment Rate Avg 9.8%



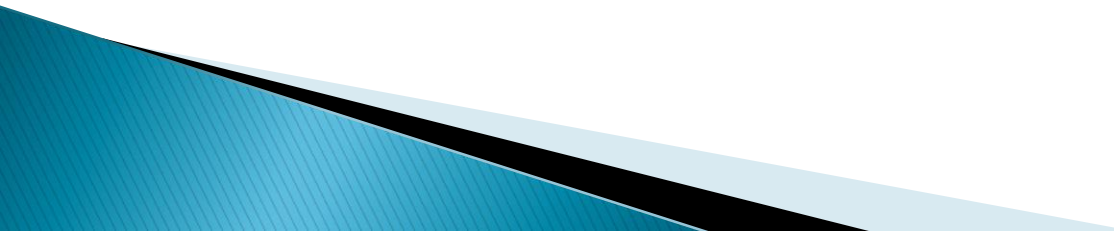
OCCAT Implementation Experience

- ▶ Changed from group orientation Appraisals to conducting one-on-one Appraisals
 - ▶ Appraisals increased from 30 minutes to 2–3 hours
 - ▶ Kept caseloads at 30–40
 - ▶ Added more interview space
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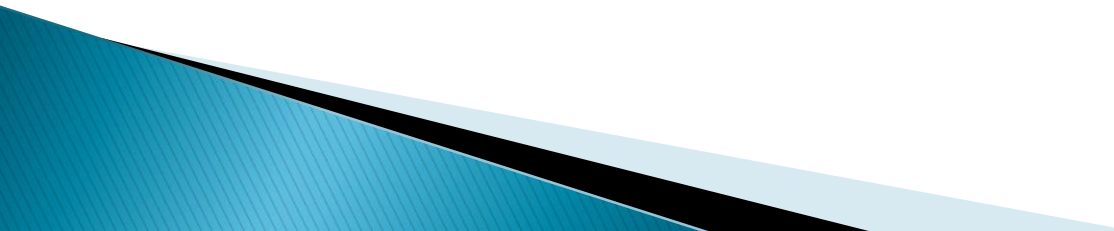
Training Needs Identified

- ▶ WTW Case Management Training
 - ▶ Staff were experiencing Secondary Stress
 - OCAT provided Webinar Training statewide–
“Healing Secondary Stress for Human Services Workers”
 - ▶ Staff could benefit from more training
 - Poverty, Motivational Interviewing, Engagement
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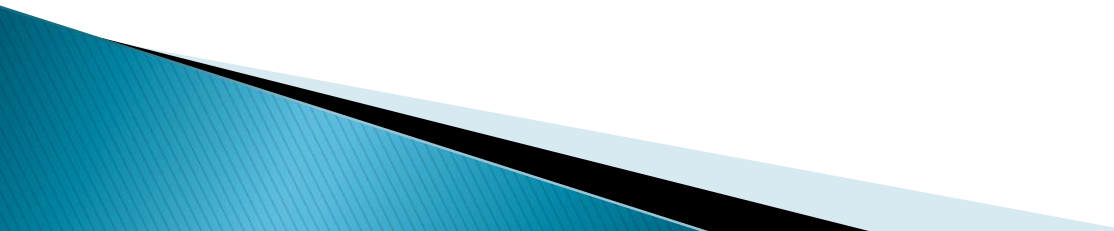
Service Needs Identified

- ▶ We discovered the need for new resources
 - DV Perpetrator Resources
 - Fatherhood Program
 - Sanction Engagement Team
 - Enterprise ReStart Program
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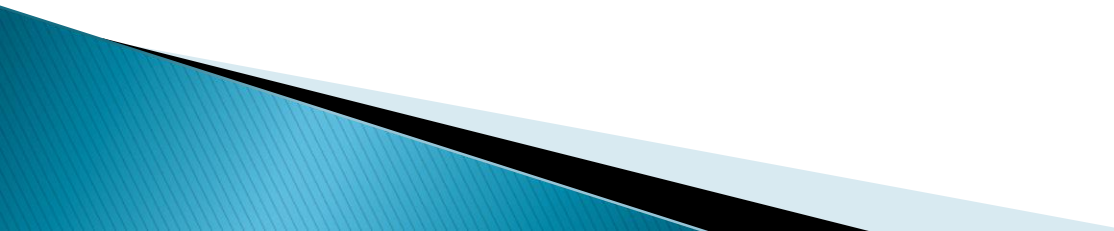
Maintaining the Relationship

- Increased Customer Communication
 - Home Visits
 - Added Equipment:
 - Laptops
 - VPN access
 - Cell Phones
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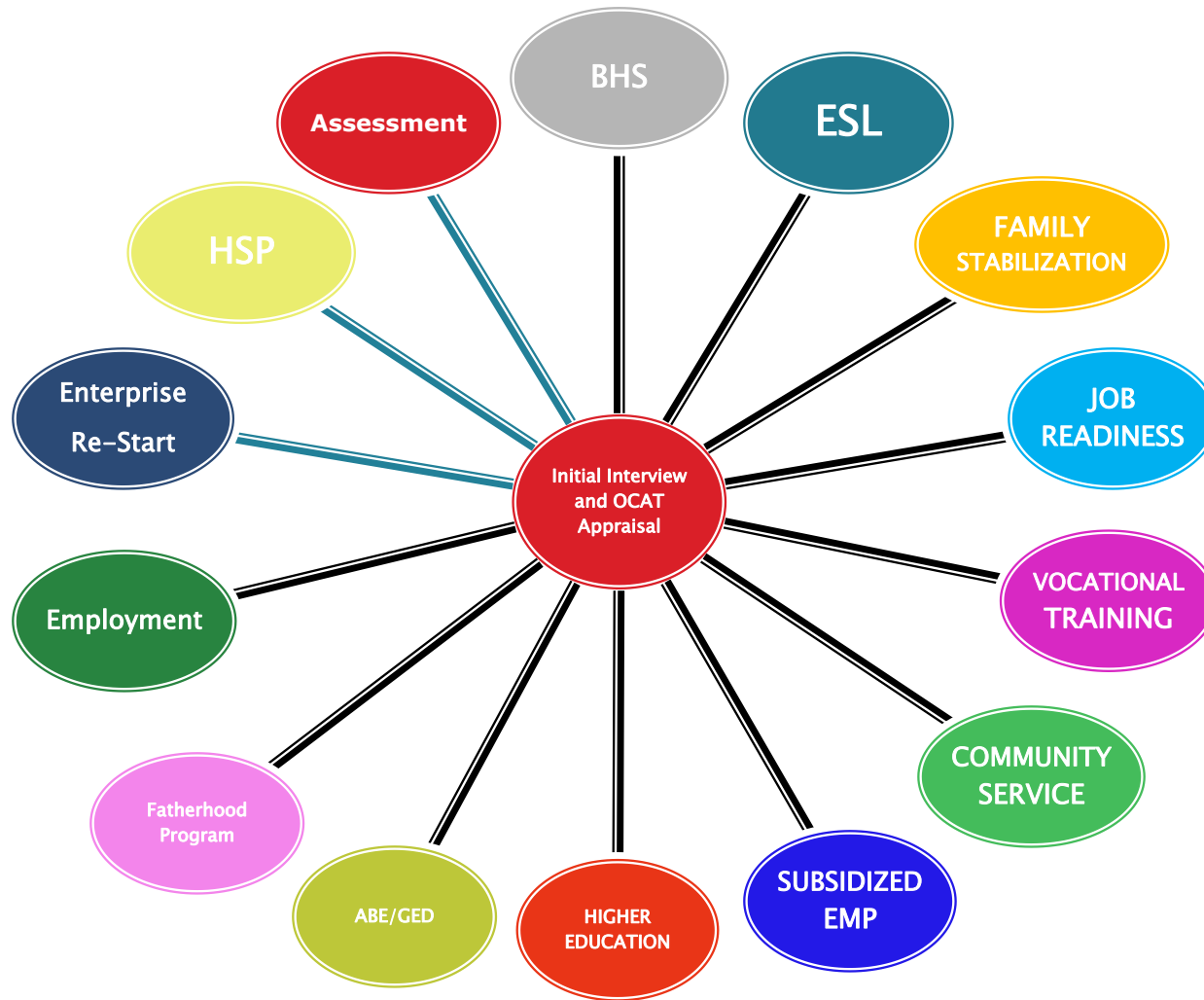
Preparing for the Interview

- Review the case and journal entries
 - Make an introduction call
 - Schedule enough time, 2–3 hours
 - Mail out the Appraisal packet
 - Bring an extra packet of all forms to the interview
 - Have water or snacks on hand
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During the Interview

- ▶ Let the Customer drive the interview
 - ▶ Be flexible – take breaks or reschedule if needed
 - ▶ Sell the advantages and incentives of the services and resources that best fit your Customer
 - ▶ Allow the Customer to develop their own Action Plans
 - ▶ Be specific when documenting the Customer's Action Plans
 - ▶ Use the Appraisal Summary Recommendations (ASR) as a tool for the customer for future reference.
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The WTW Wheel



Reminder: Assess your customer's **individual** needs and barriers to determine the "Next Appropriate Activity"

OCCAT Reports

➤ Dashboard– Identifies Clients by:

- Benefits Received
- Referral Recommended
- Potential Barriers


➤ Reports– Identifies Clients by:

- Demographics
- Employment History and Career Interests
- Educational Attainment
- Potential Barriers– Health and Substance Abuse
- Potential Barriers– Legal, Housing and Transportation
- Barriers– Childcare, Domestic Violence and Well Being

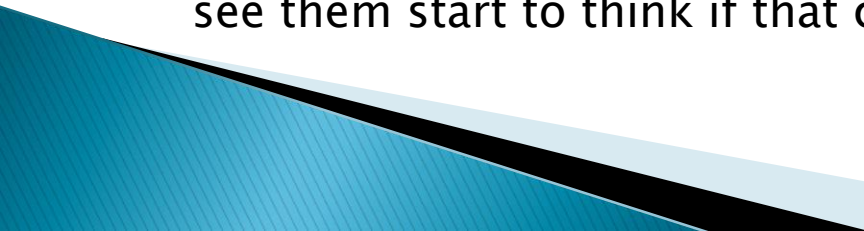
- Search by specific dates, HH type, Outstation,
- Generates in PDF or Excel format
- Helps identify Service Gaps and Customer Needs

Ad Hoc Report / Unit Logs

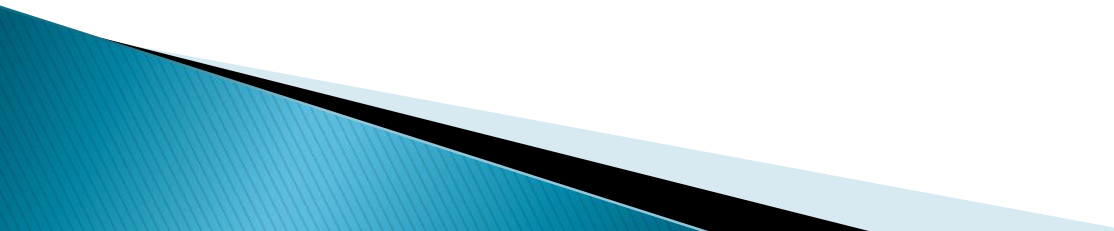
- Tells us how many OCATs are:
 - Scheduled – timely
 - Completed
 - Incomplete – reasons

 - Data collected:
 - Unit, case manager, case name and number
 - OCAT Activity Open Date
 - OCAT Activity Begin and End Date
 - Status– Active, Closed, Completed
 - Reason– Reschedule, No Show, Completed, etc.
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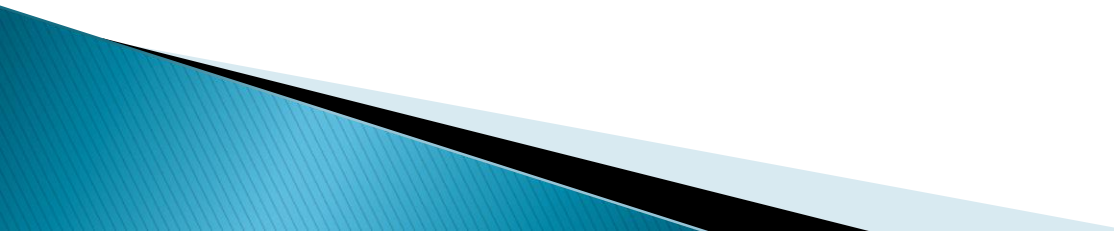
Case Manager Experiences

- ▶ “It has helped me to identify situations that customers need help navigating through.”
 - ▶ “I found that one of my customers was involved in human trafficking & the questions in that area enabled me to address it & be more sensitive about it.”
 - ▶ “It's good to be able to get to know the customers from the beginning. I think I “know” who my customers are more now than before.”
 - ▶ “OCAT gives me a format through which a dialogue is developed toward relationship building. The sensitive nature of the questions OCAT suggests gives me an opportunity to show my customer that it's ok to discuss those things (DV, sexual assault, criminal history) in a non judgmental atmosphere. Their responses help us work together to develop a realistic plan for their family's success”
 - ▶ “It has helped me better understand where my customer is in their life at that moment and where they would like to go. In cases where they don't know what their next step is, it has been nice to make suggestions and see them start to think if that could be an option for them.”
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Stanislaus Summary

- Great tool for consistently building trusting relationships with Customers.
 - Identified service gaps and partnerships we needed to create to address all our Customers' barriers
 - Increased appropriate referrals for Behavioral Health Services, Family Stabilization, Housing Support Program, and other Community Resources.
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Stanislaus Summary

- ▶ Provided more training to staff
 - ▶ Built relationships with more providers
 - ▶ Built additional services and resources to meet all our Customers' needs
 - ▶ Track OCATs to develop benchmarks
 - ▶ Online WTW Resource Directory
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