Universal Intake - Measuring Outcomes for the Whole Family Utilizing a Centralized Database System
Presenters

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- Evelyn Kinikin, Family Services Director, Cert ROMA Implementer, EICAP
- Jenniffer Reynolds, Head Start Director, EICAP
- Tawnya Clark, CSBG Programs Mgr/Casework System Admin, Cert ROMA Implementer, CAPAI

Other Team Members

- Morgan Nield, Cert ROMA Implementer, Senior Services Director, EICAP
- Brad Simmons, Weatherization Director, EICAP
- Ace Ballard, IT Manager, EICAP
- Susan Espinoza, Controller, EICAP
Learning Objectives

• How to systematically and strategically implement change to achieve long term objectives
• How to use project planning and collaboration to achieve success
• How to harvest expertise and learn from other regional/national initiatives
• How to use a phased approach to test the process
• How to solicit and capture feedback to evaluate and improve
Background

• EICAP Leadership attended the CAP Convention in San Francisco, August 2014 and learned about the 2-generation approach

• EICAP’s leadership team, as well as our Board of Directors, began to move toward a Two Generation - Whole Family Service Model

• In October 2017 EICAP received an invitation from National CAP to apply to participate in their Learning Community initiative

• Perfect timing as we were already working on our 2018-2023 Strategic Plan

• In January 2018 we joined the CAP Whole Family Approach - Learning Community Group
Two-Generation Whole Family Approach

The Two-Generation Continuum

- child-focused
- child-focused with parent elements (e.g., early childhood development, parenting skills, family literacy, and health screenings)
- whole family
- parent-focused with child elements (e.g., child care and workforce programs, food and nutrition, and supports for student parents)
- parent-focused

ASCEND THE ASPEN INSTITUTE
• In May 2018 – Attended the 2018 Whole Family Approach Institute in Washington, D.C.

• We had an epiphany that a Universal Intake/Referral process was the key to unify our 5 departments and move towards a Whole Family Approach

• We realized that we were not effectively helping the whole family. We were offering services in a very siloed way rather than having our programs work together to try and meet the needs of the Whole Family
Universal Intake/Referral Project Objectives

• Break silos and unify departments
• Serve the “Whole Family” through the variety of services offered at EICAP
• Be an agency who is data-driven so that we can make informed decisions to better serve our customers
• Outputs vs. Outcomes – Outputs only give basic numbers for the services we provide, while Outcomes are the observed results of the services we provide
• Outcomes tell a story of how we changed a family’s life
The Challenges

• Integrating agency services to assist the whole family
• Establishing baseline for referrals
• Reduction in duplication of effort
• Centralized data collection
• Mechanism for client follow-up and reporting of outcomes
Whole Family Approach - Learning Community

- Community Action Economic Mobility Initiative
  - New approach to break the cycle of intergenerational poverty
  - Help CAAs with varying levels of readiness to shift to a whole family approach
  - Underlying theory of the Community Action Economic Mobility Initiative is “when services are integrated to meet the needs of parents and children together, efficiency is improved and outcomes are enhanced…”
  - EICAP participated in the learning community cohort to share ideas and develop a Whole Family Approach Design Plan
Whole Family Approach Design Plan

- Build common goals to which all programs agree
- Develop a clear theory of change logic model
- Provide and/or connect families to services to address their unique needs
- Improve and integrate services – Universal Intake Form
- Develop progress measures and track and share data on family results – Statewide Integrated Database - Caseworthy
- Craft a shared outreach and communication strategy
- Engage local community partners
Universal Intake & Referral System
• **Vision**
  - Develop a Universal Intake process with a state-level data system that allows our staff to work efficiently across programs to meet the needs of our clients. Ultimately creating a “One Stop Shop”

• **Purpose**
  - Integrating services for tracking and measuring outcomes
  - Shift from **Transaction to Transformation**
Process Improvement

ROMA Cycle & Resources Model

- Assessment
- Planning
- Evaluation
- Implementation
- Achievement of Results
Change Leadership

“The ability to influence and enthuse others through personal advocacy, vision, and drive, and to access resources to build a solid platform for change. **LEADERSHIP** is often viewed as the key to successful change. **TRANSFORM** from inside by focusing on the people in the organization and their interactions.” (Futures Materials)
Universal Intake and Referral Pilot # 1

- Utilize Intake Staff across all programs to design Universal Intake Form
- CSBG Nutrition Program – Universal Intake
- LIHEAP PY 19 – Referrals
Pros & Cons of Universal Intake Form

**Pros**
- Better able to identify client needs with Intake
- More complete and accurate information
- Fewer Duplicated client records

**Cons**
- Clients and Staff feel that application is too long/too many details with demographic questions
- Place on application to indicate the program applying for
Pros & Cons of Referrals

**Pros**
- Immediate action on client needs - no post it notes
- Referrals generated directly from the database
- Simple to complete

**Cons**
- Remembering to follow through with the referral
- No process for follow-up
Solutions

• Universal Intake Form & Referral Process
  • Add a field on the form to indicate program or service customer is seeking
  • Move to electronic forms and have clients fill out forms on tablets
  • Install an instructional video in the waiting room to guide people through the application in English and Spanish
  • Design an App where the form can be accessed remotely
  • Develop a closed loop referral workflow that can be tracked and managed electronically
How will it benefit the agency?

• Unified departments
• Create a "One Stop Shop"
• Show our funders the real difference we are making vs. arbitrary numbers
• Integrating agency services to assist the whole family
• Establishing baseline for referrals
• Reduction in duplication of effort
• Centralized data collection
• Mechanism for client follow-up and reporting of outcomes

How will this affect my job?

• Cleaner data and reports
• Universal database
• Double intake entry (in beginning)
• Additional training
• Increased efficiency
How will it Benefit our Customers?

- Tool to identify needs for multiple lines of services for the Whole Family
- Mechanism to initiate referrals to other agency services to meet those identified needs
- A single data collection Intake point that will eliminate multiple Intake interviews
- A centralized repository of historical client data for referencing, tracking, monitoring, and reporting
- Intake Forms can be completed electronically and/or remotely via App (Next Steps)
- A “One Stop Shop” for our customers
FUTURES PROJECT

• The futures project is an initiative in Region 10 (excluding Alaska), to implement the Theory of Change
• Participants were CAP agencies in Washington, Oregon, and Idaho
• Contracted with the Prosperity Agenda to facilitate the training
• Three cohorts
• EICAP participated in the last (third) cohort
• Used our Universal Intake and Referral as our Project
• Partnered with our State Association to integrate our Universal Intake Form and Domains of Poverty into the State Database CaseWorthy
FUTURE'S FEEDBACK LOOP
Futures Project

- Kick off meeting in person - Portland, Oregon Feb. 11-12, 2019
  - 13 Dimensions of Poverty
  - Feedback and staff involvement
  - ADKAR
    - Awareness
    - Desire
    - Knowledge
    - Action
    - Reinforcement

"Successful change agents avoid getting stuck in the confines of their own industry"
Increasing Stability and Creating Community Pathways Out of Poverty

Healthy Individuals & Families

STABLE
Basic Needs Secure
- Food & Nutrition
- Warmth
- Housing

Physical & Mental Health
- Mobility (Transportation)

EQUIPPED TO EXIT POVERTY
Resilient | Stable | Resource Adequate
- Safe & Thriving Childhoods
- Income
- Growth Mindset
- Education

Financial Resilience (Assets)
- Employment
- Social Networks

Diverse, Equitable, Inclusive and Healthy Communities

CHANGED ATTITUDES
People understand their stake in creating diverse, equitable, inclusive and healthy communities.

Engaged Community Members
Education, Volunteerism, Advocacy, Giving

Shared Vision
Coalitions and Partnerships, OA Leaders and Catalysts

CHANGED PRACTICES
Improved Services, Resources
Targeting Existing Resources, Creating and Leveraging New Resources

Local Systems are Equitable

ASSESSMENT WITH STAKEHOLDERS, INCLUDING PEOPLE AFFECTED BY POVERTY, INEQUITY AND BIAS, TO PROVIDE A CONTEXT FOR OUTCOME MEASURES AND TO IDENTIFY WHETHER SHARED GOALS AND GENERATED RESOURCES CORRESPOND WITH THE ACTUAL NEED.

A project developed by Community Action Agencies in the states of Washington, Oregon and Idaho
The National Community Action Network Theory of Change

Community Action Goals

Goal 1: Individuals and families with low incomes are stable and achieve economic security.

Goal 2: Communities where people with low incomes live are healthy and offer economic opportunity.

Goal 3: People with low incomes are engaged and active in building opportunities in communities.

Services and Strategies

Core Principles

- Recognize the contributions of the issue of poverty
- Build local solutions specific to local needs
- Support family stability as a foundation for economic security
- Advocate for systemic change
- Pursue positive individual, family, and community-level change
- Maximize investment of people with low incomes
- Engage local community partners and citizens in solutions
- Leverage state, federal, and community resources

Performance Management

How well does the network operate?
- Local Organizational Standards
- State and Federal Accountability Measures
- Results-Oriented Management and Accountability System

What difference does the network make?
- Individual and Family Indicators
- Community Indicators
- Performance Indicators

A national network of over 1,000 high-performing Community Action Agencies, State Associations, State offices, and Federal partners supported by the Community Services Block Grant (CSBG) to mobilize communities to fight poverty.

The publication was created by RAMP in partnership with the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services, State Director’s Office.

Domains of Poverty

Futures13 Dimensions of Poverty

- Employment
- Safe & Thriving Children
- Growth Mindset
- Education
- Income
- Mobility
- Financial Resilience
- Warmth
- Housing
- Food & Nutrition
- Physical & Mental Health
- Social Networks

National Theory of Change

Domains of Poverty

- Employment
- Education & Cognitive Development
- Income, Infrastructure & Asset Building
- Housing
- Health/Social Behavioral/Development
- Civic Engagement & Community Involvement
GOAL: Enhance and refine our Universal Intake Form by incorporating the National Domains of Poverty

- Employment
- Education & Cognitive Development
- Income, Infrastructure & Asset Building
- Housing
- Health/Social Behavioral/Development
- Civic Engagement & Community Involvement
Intake Staff Training 3/14/19

• Met with all intake staff from all departments (about 25 total)
• Covered the following:
  • Goals, purpose, and vision
  • Reviewed Universal Intake Form
  • CaseWorthy overview/walkthrough
Feedback - Preliminary Survey

- Do you feel you understand the purpose of the Universal Intake Form?
  - 45% Strongly Agreed

- Do you feel that you have received adequate training on your role on this process?
  - 27% Strongly Agreed
  - 9% Disagreed

- Do you understand the entire process from intake to referral?
  - 9% Strongly Agreed
  - 9% Disagreed
  - 36% Neutral

- Do you feel like we are capturing the necessary information needed from the client?
  - 9% Strongly Agreed
  - 36% Neutral

- Do you feel like your current workload can accommodate this extra task?
  - 9% Strongly Agreed
  - 36% Neutral
Feedback - Post CaseWorthy Training

• Was this training helpful?
  • Out of 18, 100% said yes

• Do you feel like you have a good understanding of the purpose and goal of the universal intake form?
  • Out of 18, they all agreed

• Was the CaseWorthy walkthrough/training helpful?
  • 16 out of 18 agreed that it was helpful

• Do you have any reservations about continuing with this Universal Intake Process?
  • 16 out of 18 did not indicate having any reservations
  • Desire for more training was expressed

• Any other comments?

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Meeting with State Association

- Met with State Association on 3/18/19 to discuss how to implement our Universal Intake Form into the CaseWorthy Database
Roadmap to Success

- Developed EICAP 5-year Strategic Plan: Oct 2017 - Oct 2018
- Joined Whole Family Approach Learning Community Group: Jan 2018
- Attended Whole Family Approach Institute - Washington DC: May 2018
- Presented Final Design Plan CAP: May 2018
- LCG Cohort - Draft Universal Intake Design Plan: June 2018 - Dec 2018
- Presented Universal Intake project - Futures Final Convening: April 2019
- Begin Caseworthy Universal Intake/Referral Training for Staff: April 2019
Next Steps

- Continue to evaluate and refine the system
- Research and evaluate interface with other data systems (i.e. Child Plus) to reduce duplication of effort
- Evaluate capacity of current data entry staff
- Adjust staffing needs as appropriate
- Hire Data Analyst – November 2020
- Design and implement closed loop data tracking, updating, and reporting process
- Develop electronic intake capabilities for customers and design a phone App
- Craft a shared outreach and communication strategy
- Continue collaboration with State Association toward statewide implementation
Timeline Moving Forward

**July 2019**
Training—July 15th-16th
- Leadership — (1 Full day)
- Family Services/ Aging/ Weatherization (1 day)

**August 2019**
Training—August 26th
- Universal Intake Process
- Referral Process
- Evaluate Training needs via survey the week of September 16th

**September 2019**
Practice in CaseWorthy
- Evaluate training needs

**October 2019**
Live for Family Services Aging, Weatherization—October 1st

**October 2019**
Phase 1 in Progress
- Family Services
- Aging
- Weatherization

**November 2019 - January 2020**
February 2020
Evaluate Phase 1 Results—February 10th
• Household Movement Training—February 10th
• Training: Housing Department—February 11th
• Basic Universal Intake and Referral Training—February 24th

Live for Housing—March 1st
March 2020

April-June 2020
Phase 2 in Progress
• Housing
• Close all Universal Intake Enrollments June 30th of each year

Evaluate Phase 2 Results—July 13th
• Household Movement Training—July 13th
• Training: Head Start Department—July 14th
• Basic Universal Intake and Referral Training—July 27th
• Start new Universal Intake Enrollments as of July 1st of each year

July 2020

August 2020
Live for Head Start—August 1st

Phase 3 in Progress
• Head Start

September 2020-January 2021

Feb. 2021
Evaluate Phase 3 Results—February 22nd
• Household Movement Training (All Departments)—February 22nd
• Survey to evaluate additional training needs and how to improve—February 25th

Universal Intake and Referral System Fully Implemented—March 1st
• 1st Annual Universal Training/Refresher—March 22nd
• Annual Universal Training/Refresher will be held every March

Mar. 2021
EICAP is leading the way toward implementation of a statewide data management system for tracking and reporting measurable outcomes for the whole family!
Acknowledgements

• National Community Action Partnership - Whole Family Approach Learning Community Group – Tiffney Marlow, Liz Poris, Jeannie Chaffin, and Denise Harlow

• Futures Project - Kim Tully, Prosperity Agenda

• Community Action Partnership Association of Idaho – Wil Gehl

• EICAP Board of Directors, Kathy Harris – President

• EICAP Intake and Program Staff
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YOUR OPINION IS VERY IMPORTANT TO US. PLEASE TAKE A MOMENT TO EVALUATE THIS WORKSHOP IN THE 2019 CAP ANNUAL CONVENTION EVENT APP.

THANK YOU!
Demonstration

Universal intake and Statewide Database Integration

Idaho’s universal intake and statewide database - Caseworthy

Tawnya Clark
CSBG Programs Mgr/CaseWorthy System Administrator
Community Action Partnership Association of Idaho
Users can send their first referral e-mail during the initial intake and send more right after the intake.

CSBG AR Questions
Family Financials