

# Linkages Guidelines for Enhancing Family Engagement

through the CalWORKs & Child Welfare Partnership



A publication of the  
**CHILD & FAMILY POLICY INSTITUTE OF CALIFORNIA**

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# Welcome Message

Dear CalWORKs and Child Welfare Colleagues:

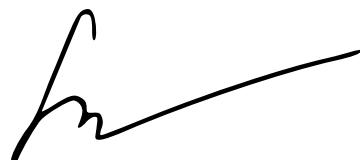
Since 2000, California counties and CDSS have worked together to promote a collaborative approach to supporting families involved in both the Child Welfare and CalWORKs systems. This work has evolved through several phases, including the implementation of a federal demonstration project from 2006-2012. Most recently, CDSS has provided financial and programmatic support to underscore the importance of Linkages and to promote its evolution to include a Primary and Secondary Prevention focus that complements the historical work of Linkages in serving families through Tertiary Prevention efforts.

The Child and Family Policy Institute of California (CFPIC) has been privileged to provide facilitation for this work over most of the Linkages history. In 2009 CFPIC sponsored work that culminated in the development of a document titled, “Guidelines for Enhancing Family Participation through Coordinated Case Planning,” under the guidance of Linkages Project Director, Danna Fabella, and the primary authorship of Leslie Ann Hay of Hay Consulting.

We are now pleased to present to you an updated version of that document. The **“Guidelines for Enhancing Family Engagement through the CalWORKs & Child Welfare Partnership”** reflects the evolution of Linkages since 2009, including its new focus on all three phases of Prevention (Primary, Secondary and Tertiary) and to align the guidelines with current practice and terminology. We believe that central to the effective collaboration of CalWORKs and Child Welfare is the way staff from both agencies engage with families. These guidelines bring life and nuance to this unique coordination.

Linkages has had a long history of strengthening families in California. We hope this new edition of guidelines leads to even more counties implementing Linkages.

Sincerely,

A handwritten signature in black ink, appearing to read 'Stuart Oppenheim', with a long horizontal stroke extending to the right.

Stuart Oppenheim, Executive Director



## Acknowledgments

The Linkages Family Engagement Guidelines task group met over the course of 2022 to conduct a deep review of the original 2009 version and create a revised version to publish in 2023. Many people from across the state contributed their time, insights and expertise into the revision process. Leslie Ann Hay of Hay Consulting for CFPIC was instrumental in guiding the revision process and writing the guidelines themselves. Evidence of this collective and cohesive effort shows in the clarity of the final product. We are grateful to the task group who generously contributed their time, attention and expertise to make these guidelines possible:

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**Publication Date: March 2023**

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# Introduction

## About This Document

The purpose of this document is to guide California Work Opportunity and Responsibility to Kids (CalWORKs) and Child Welfare Services (CWS) staff in their collaborative Linkages practice with families. The document begins with background information about the evolution of Linkages toward a prevention focus. Next, the central role of family engagement across the continuum of Linkages service coordination is described. The remainder consists of 18 guidelines organized around the key elements of the Integrated Core Practice Model (ICPM) which aligns all California human service agencies working with children, youth and families. Taken together, these guidelines serve as a set of best practice principles to help promote child safety, family resiliency and economic stability for Linkages families.

These guidelines are intended to complement CWS/CalWORKs policy and procedures. Rather than providing explicit directives, this document offers best practice guidance for family engagement, case coordination, and collaboration across an array of Linkages protocols.

## Evolution of Linkages in California

Formal collaborations between CWS and CalWORKs to improve outcomes for families have been evolving in California since 2000. Originally known as the CalWORKs/Child Welfare Partnership Project, 13 counties began Linkages collaborations to serve mutual clients in 2000. In 2006, it became one of five demonstration grants funded by the federal Administration for Children and Families (ACF) and expanded to 32 counties with active Linkages practices in place. The initial goal of coordinating services to better serve families and improve safety and economic stability outcomes remains. In 2021, an additional focus on prevention—across the full range of involvement with CalWORKs and CWS—led to a revamping of Linkages practices. This prompted an influx of counties adding Linkages to their service array.

# Linkages: A Prevention Partnership to Strengthen Families



CalWORKs and CWS both offer programs to promote child and family well-being. By working together, families on CalWORKs can receive information, services and supports to prevent the occurrence and recurrence of child maltreatment. Likewise, families involved with CWS can receive resources, opportunities and assistance to help them achieve and sustain both family and economic stability.

When Linkages becomes a prevention strategy across the lifespan of families' involvement in either system, children are safer, and families are stronger. Linkages can provide collaborative services to families at three levels of prevention.

## Three Levels of Prevention

Level of Intervention	Target Population	Linkages Activities
Primary Linkages:  <b>Prevention</b>	Applicants for and recipients of CalWORKs who are not involved in CWS	Provide information & materials to promote child and family well-being
Secondary Linkages:  <b>Early Intervention</b>	Applicants for and recipients of CalWORKs with identified risk factors/ service needs who may or may not have been referred to CWS; but if so, a CWS case has not been opened	Align & coordinate early intervention services and supports
Tertiary Linkages:  <b>Mutual Client Coordination</b>	Families who are on CalWORKs and have an open CWS case	Coordinate joint services, supports & resources to prevent re-entry to CWS & alleviate economic stressors





## Benefits of Linkages Participation

An overall benefit of Linkages participation by families at any level of intervention is a more tailored response to family need. The individualized focus of Linkages on the immediate needs of families, without having to choose between services (employment services vs. reunification) leads to greater success. Specific benefits to each level of Linkages intervention include:

### Prevention

**Reduces Risk of Harm:** Reduces the risk of harm by connecting families to CalWORKs services, supports and other resources they need earlier before circumstances escalate to the point of CWS involvement.

### Early Intervention

**Supports Vulnerable Families:** Provides the services, supports and resources to at-risk families by immediately responding with specific referrals (e.g., Differential Response, Family Stabilization Services) aimed at addressing risk factors and meeting basic needs.

### Mutual Client Coordination

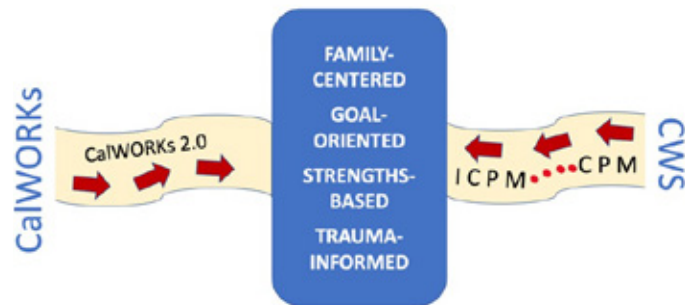
**Achieve Faster, Better Reunification:** Provides resources, supports and services that facilitate more effective ways for Linkages families to remain together or reunify quickly and safely without return.

**Streamlined and Easier Access to Services:** Linkages case coordination allows families to experience fewer competing expectations, easier pathways to the services they need and simpler processes along the way.

## Practice Evolution: ICPM and CalWORKs 2.0

These benefits are built on an evolving service delivery environment. Since 2016, both CWS and CalWORKs have been focused on transformative changes to their service delivery systems. The graphic below depicts the evolution of both programs toward more family-focused, goal-oriented, engagement-driven, and trauma-informed approaches to helping families succeed.

For CalWORKs, the transformation has focused on the implementation of CalWORKs 2.0. For CWS, the change began with the implementation of the Core Practice Model (CPM) and culminated with an Integrated CPM (ICPM) which anchors this approach for use by all of California's public systems serving children and families.



These reform efforts build on the foundation of California's commitment to whole person, whole family approaches and a Children and Youth System of Care ensuring access to individualized child and family-centered planning grounded in cultural and linguistic competence; recognizing the social determinants of health including the impact of poverty, exposure to violence and trauma including the effects of historical and secondary trauma; and promoting the power of hope, resilience, and recovery.

Linkages incorporates specific strategies to involve families as experts in creating more successful futures. When serving common clients through Linkages, many counties are using two key approaches highlighted in the ICPM and supported by CalWORKs 2.0:

**1. Child and Family Teams (CFTs) are family-centered teams of individuals who are invested in supporting the safety and well-being of the child and their family. CFT meetings are used for safety planning early in the child welfare assessment process and later for ongoing case planning and monitoring of open child welfare cases. Examples of Linkages approaches to family engagement in the CFT process include:**

- **Assistance for Parents** – CalWORKs staff participation in the CFT can help address the parent's support needs including creating a plan to lift sanctions and providing access to specialized services (e.g., mental health, substance abuse, domestic violence, family stabilization and home visiting) to which the parent may be eligible due to their CalWORKs status.
- **Assistance for Relative Caregivers** – CalWORKs staff can arrange for expedited CalWORKs cash assistance benefits for relative caregivers when a decision to place the child with relatives is agreed to at the CFT meeting.

**2. Family Participation in Case Planning is a process that actively engages families in defining their strengths and identifying resources that will address the problems which resulted in family destabilization. Examples of Linkages approaches to family engagement in case planning:**

- **Reducing Barriers for Parents** – Involvement in the child welfare system can sometimes result in parents feeling alienated or isolated by events causing their involvement in CWS. CalWORKs case managers can help engage the parent by focusing on increasing their economic stability. Specifically, provision of barrier removal services and building employment skills can help parents overcome challenges that contribute to the family’s instability.
- **Coordinated Case Planning on Mutual Cases** – When a family has an open child welfare case and is also participating in Welfare to Work (WTW), Linkages can help coordinate and align expectations, services, supports and timelines so that families can be more successful in meeting both sets of goals. This prevents families from being hindered by conflicting requirements between the two plans, streamlines efforts and maximizes results.
- **Joint Ongoing Monitoring** – When a plan has been developed jointly with child welfare and CalWORKs, the family feels acknowledged by both caseworkers. With continued joint monitoring, parents are more likely to communicate with their team about obstacles, adjustments or accomplishments along the way.
- **Key Milestones Are Valued by Both Programs** – When the planning team pays equal attention to both the immediate crisis of family instability and the longer-term objective of economic stability, the family is more likely to embrace a sense of agency for their own future. Whether the parent learns a new job skill or discovers a new way to safely discipline their child, both their workers celebrate these gains. Likewise, if either worker observes the family deviating from their desired path, the team can be brought together to re-engage the family.

# Family Engagement is Key to Promoting Child and Family Well-Being



## The Value of Family Engagement

Evidence shows<sup>1</sup> that engaged families are more likely to collaborate and cooperate with case plans, choose services or treatments they feel will help them, follow-through with services and make life-long changes. Strengths-based assessments using a goal-oriented framework increase family involvement and motivation. As a result, parents build the skills and supportive relationships necessary to promote child safety, and family and economic stability. This approach aligns with the California Department of Social Services (CDSS) vision “to serve, aid, and protect needy and vulnerable children and adults in ways that strengthen and preserve families, encourage personal responsibility, and foster independence.”

Engagement is an ongoing relational process that needs to be intentional throughout the case life cycle. This includes a range of activities, behaviors and styles of interaction that create an effective working alliance for change. The act of ongoing assessment is tightly linked to engagement. To better understand the family’s experience, behavior and skills it is essential to rely on inquiry, observation, engagement and exploration. Taken together, the story of the family’s current priority needs and strengths emerges. From here, solutions for positive change are possible. Examples of successful family engagement include:

- Reaching out to families in ways relevant to their situation with an emphasis on equity and sensitivity to the values of their culture, such as inquiring about a family’s holiday traditions or bringing key information translated into the family’s preferred language.
- Building from the family’s strengths, capacities, cultural background and resources to develop creative solutions that address the circumstances interfering with the family’s success, such as supporting the family’s choice of service providers.

1 Dawson, K. & Berry, M. (2002). *Engaging families in child welfare services: An evidence-based approach to best practice*. *Child Welfare*, 81(2), 293-317.

- Fully disclosing information relevant to help inform the family’s decision-making in the case, such as discussing consequences and benefits of decision options.
- Encouraging families to be involved in helping public agencies and community-based organizations develop and evaluate responsive, family-centered policies and services, such as inviting families to help design programs and services.
- Being consistent in interactions with the family to build a sense of trust, for example, keeping scheduled meetings, making agreed upon referrals, and following through on commitments.

Families in particularly difficult circumstances—those experiencing conditions of poverty, food scarcity, housing insecurity, lack of access to vital resources and more—may benefit the most from family engagement strategies. They also may be the most challenging population in which to develop the relationships and commitments necessary for meaningful and successful family participation.

When families are effectively engaged through Linkages service coordination, they demonstrate greater commitment to the change process, improved self-esteem as the family is respected and valued, increased sense of empowerment, enhanced family resiliency and more comprehensive understanding of the information and processes involved in case planning. These empowering experiences for the family are indicators of increasing family stability and child safety.

## Family Engagement Through Linkages Collaboration

The collaboration between CalWORKs and CWS creatively engages families to achieve their goals—ensuring child safety while promoting family economic stability. Within Linkages, a variety of family engagement strategies are employed in this coordinated effort:

- **Teaming** – Dedicating staff to coordinate their efforts as a team centered on engaging families to address both their child safety and economic needs.
- **Coordination** – Collaboratively developing coordinated case plans that serve, support and involve families, including streamlining duplicate or redundant services offered by both agencies. Ensuring access to services from one agency that may not be available through the other.
- **Brokering** – Accessing resources for meeting complex and/or specialized needs through participation in their WTW activities such as barrier removal services (e.g., housing assistance, mental health services) and work activities (e.g., job search, vocational assessments), while CWS provides incentives to participate in these services.
- **Outreach** – Collaboratively creating additional outreach opportunities to better address a CalWORKs recipient’s sanctions, homelessness or exemption issues. Proactive resolution of these barriers can strengthen parents’ engagement in case planning, participation in services and work activities, and follow-through on case plan goals.

# Linkages Family Engagement Guiding Principles

These guidelines provide a set of practice principles to help promote child safety, family resiliency and economic stability for Linkages families. They apply to the entire continuum of practices, are aligned with CalWORKs 2.0 and are organized into categories that mirror key components of the ICPM: Engagement, Assessment, Service Planning & Delivery, Coordination & Case Management, Support & Adapting, Transitioning.

## ENGAGEMENT

These principles are fundamental for effective family engagement practice when CWS and CalWORKs are working together to meet families' needs.

### 1. **Involve the family in all matters pertaining to their future.**

Nothing contributes more to a family's already low sense of control or disempowerment than having all their decisions made for them. Even when the necessities of child safety limit the options available, Linkages teams have found that starting the conversation by asking the family what they want to accomplish and helping them understand the options available to them increases both buy-in and follow through.

### 2. **Value and reinforce consistent communication and persistent collaboration.**

Over time, Linkages collaboration can streamline efforts, maximize results and help mutual clients achieve their goals. The central collaborative skill is communication. As staff communication and interaction increase and become standard practice, the benefits of sharing the load through collaboration can overcome the initial

challenges of working together. This spirit of partnership is also aligned with encouraging families to connect with and utilize resources within their own network of support and community long after their involvement in the formal system has ended.

### PRACTICE TIP

An important skill is inviting families into the collaboration process. Once you have developed a relationship with a parent, how do you introduce them to new members of the team? Do you present them more as partners in their own journey or as clients to be treated? One of the ways we sense the degree of respect other people have for us is in how they introduce us to new groups. What does the way you introduce families to new social workers or resource providers convey?



### 3. Share a strength-based, family-centered, trauma-informed approach to practice across both service systems.

The shift from a deficit-based to a strength-based approach is much easier to embrace in theory than it is to express in practice. Not only are old habits hard to break, but access to most services is problem-driven. To encourage hope and healing, it is critical that staff find ways to look beyond the problems to the person they are serving.

#### PRACTICE TIP

A simple change in language when initially engaging families reinforces a trauma-informed approach. Rather than asking a parent, “What seems to be the problem and how can I help?” begin with, “What happened to you and how can we support?”

Take time to hear stories about when family members used strengths and coping skills to get through previous difficulties. By tapping into what are often remarkable histories of resiliency in the face of major obstacles, not only do the CWS and CalWORKs staff discover more options to build upon, but families also see themselves as being understood and valued by those who are trying to help them.

#### PRACTICE TIP

Each county and every worker develop their own strategies for increasing family participation. Consider coming into each meeting with a set of questions to encourage family engagement. Some examples are:

- What do you feel is the most important thing for us to work on at this time?
- What do you think your family needs most right now?
- When you were in tough situations like this before, what helped you make things better?
- Pretend it’s six months from now, and things are finally going better for your family. Imagine it’s a regular day when things are going well. Tell me how that would look? Walk me through the day. What happens first thing in the morning? Then what?

## ASSESSMENT

Understanding the family's needs, strengths, circumstances and history through the lens of their involvement in CalWORKs and CWS can often shed new light on both the realities and opportunities in their lives.

This not only engages the family in a more comprehensive way, but also helps determine the most appropriate service response from a family-centered, strength-based, and trauma-informed perspective.

### 4. Determine whether a family is involved in the other program at the time of intake.

At the point of intake, there is an opportunity to learn what other systems the family may be working with. Knowledge about whether or not a family is involved with CalWORKs at the point of initial engagement by an Emergency Response worker can help determine what other benefits may be available to the family. Likewise, knowing whether a family has a child welfare plan in place when they are about to begin a WTW plan is key to helping a parent balance multiple case expectations. Recognizing the family's involvement in both service systems is an important consideration for the case planning team. Addressing concurrent goals of family and economic stability, tapping into a broader array of services and supports and streamlining program expectations becomes central to helping the family succeed.

Counties use two primary ways to identify mutual clients. Some counties create a "match list" of common clients by extracting data from CalWORKs and child welfare case management systems. In other counties, Linkages teams have a point person in each program who can quickly access current participation data and relay it back to the requesting worker.

## PRACTICE TIP

Although making better use of automated data systems is an effective solution for identifying mutual clients, sometimes a personal touch can be just as helpful. In some counties, a co-located CalWORKs specialist has their desk near where the CFT facilitators are located. If a question about CalWORKs involvement comes up during or in preparing for a meeting, the CalWORKs specialist can confer with staff, answer any immediate questions, and recommend potential service coordination opportunities, if appropriate.

### 5. Explore the family's strengths, needs, and goals in the context of child safety and family stability.

The family's current circumstances can be better understood through joint assessments that identify common barriers (e.g., substance abuse, mental health, domestic violence) to achieving safe parenting and economic stability. CalWORKs workers engage with parents around building employment and economic competencies. This can surface important strengths, needs, and goals that CWS workers can encourage a parent to integrate into their child welfare plan. Likewise, sharing assessment information about parenting and safety progress translates to a more stable foundation for the parent to focus on employment goals.



## 6. Collaborate between CWS and CalWORKs to inform safety planning for mutual clients.

Resources available through CalWORKs may help keep children safely at home and prevent placing them in out-of-home care. Inviting experts from CalWORKs to a CFT or Safety Planning meeting can make all the difference. CalWORKs staff bring knowledge about what WTW services are available to the family and can address other issues that may interfere with the family's success (such as creating a plan to lift sanctions, or leverage exemptions). This kind of expertise engages the parent in realizing that CalWORKs can help support them while they work toward creating a safer and more stable environment for their children.

“In addition to assessing child safety, we’re looking at economic stability of the family and how work participation can help parents increase their confidence and self-esteem and have healthier interpersonal relationships.”

– Stanislaus County, Case Study Site Visit

## PRACTICE TIP

A practical and easy tool for engaging families around strengths instead of deficits is the creation of a “strengths resume.” These inventories are helpful on both the CalWORKs and CWS side. The point is to not only catch clients doing something good, but to record it. As the family makes progress, the resume of the family as a whole and of each family member grow. Here are examples of entries from a family strengths resume:

- On February 12, Cindy (the mother) held it together all day while dealing with two sick, crying children, demonstrating patience, perseverance and compassion. These qualities not only show that she is a better parent but also will help make her an outstanding employee.
- On March 1, Randall (the father) listened politely the whole time his supervisor was yelling at him for a mistake that he had made. He not only kept his cool, but he earned extra respect by saying to the supervisor, “You’re right, we make it or break it as a team. I’ll do my best to make sure it doesn’t happen again.” Being able to deal with conflict proactively is a key employment skill and can make things better at home as well.

## SERVICE PLANNING AND DELIVERY

After gaining a joint understanding of family needs, continued coordination to prioritize the appropriate service response ensures the family receives the most comprehensive array of services to address child safety and economic stability.

### **7. Help families prioritize child safety and economic stability needs to focus service planning efforts.**

While the immediate crisis of child safety may temporarily reduce the family's focus on working toward economic stability, the continued stress of poverty can contribute to an increased risk of maltreatment. A coordinated planning process can prioritize those issues and needs that may be compromising both the family's ability to safely care for their children and to secure and maintain employment.

### **8. Adhere to standard confidentiality requirements.**

In many counties, the sharing of information between CalWORKs and child welfare case managers is permitted under their counties' interpretations of confidentiality provisions such as Welfare and Institutions Code §10850 (sharing information in the administration of public welfare) and §18964 (sharing information among members of a multi-disciplinary team). However, the most effective method of authorizing and sharing of information is through obtaining a signed release of information from the family. Securing the family's permission to share information related to meeting their service needs across child welfare and CalWORKs is an essential part of establishing the trust and respect needed for meaningful engagement.

There are two elements to addressing this need. The first is technical. Because CWS and CalWORKs have different release forms with different requirements, representatives from the two offices need to sit down together with all the forms in front of them and create a shared information release policy or an integrated form that meets the highest level of requirements from the two agencies. The second is practice related. It is so easy to treat information release as a nuisance to get through. Staff need to take the time to help families understand what they are signing. Doing this shows respect to the family. It also provides an opportunity for case workers to demonstrate another perspective on how the systems work together by explaining the nature of the release.

### **9. Utilize court ordered case plans to motivate client participation in WTW activities.**

The juvenile court plays a vital role in focusing the parents' attention on the changes in their lives that are needed to keep their children safe and their family stable. When the court understands that CWS and CalWORKs are working together to help the family succeed, then judges can reinforce the expectation of parental participation in WTW services as a means of meeting their child welfare goals. This not only influences positive safety, permanency and well-being outcomes, but can also increase work participation rates. Likewise, there are CWS case plan activities that count as WTW employment activities and can help lead to economic stability.

## COORDINATION AND CARE MANAGEMENT

Although CalWORKs and CWS have different requirements for the case plans they must produce, working together to coordinate these plans can prevent conflicts, reduce redundancy, and take maximum advantage of the resources and supports available through both agencies.

### 10. Establish basic knowledge about the mission and services of the other program across caseworkers, supervisors, and managers.

To build a collaborative team, get to know one another's systems enough to be effective partners. Staff at the caseworker, supervisor and manager levels will benefit from building strong working relationships, learning about each other's roles and responsibilities, exploring the differences in the culture and mandates that shape how each program operates, and better understanding the resources and services available.

### 11. Coordinate child welfare case plans and WTW plans to improve a family's chances for success.

Streamlining case plan activities, eliminating duplication, accessing available resources from both CalWORKs and CWS, and jointly monitoring progress creates a more realistic, responsive and coordinated plan—one that families can embrace.

Ideally, a coordinated case plan reflects the three-way partnership foundational to Linkages: the family, CWS, and CalWORKs. If someone holds the coordinated plan up, all three should say, "This is our plan."

An essential element of coordinated case planning is the sharing of resources. CalWORKs/WTW supportive services are available to assist CWS-involved families access to childcare, transportation, job training, or secondary education as well as behavioral health or substance abuse treatment services. In addition, the activities required in the CWS case plan can often count toward work participation requirements in CalWORKs.

Counties have found that while this coordination requires time and attention, it also produces far greater benefits. Most participating counties report that they use a process of parallel plan development because of the differences in timing, context and content for each plan. However, some county workers then engage the family in creating a short document, one or two pages, which contains the key coordinated case plan elements. The point is to make it short enough that the parent can post it on a refrigerator.



“I used to see more children being detained, and now I see social workers providing more services and keeping families together. For example, with Linkages teaming, a mom with four children was able to get housing, make appointments, and reunify with her children...If Linkages was not working, she would not have been able to do it.”

– Los Angeles County, Case Study Site Visit

## 12. Transform existing case planning meetings into coordinated case planning sessions.

Families involved in multiple systems feel an increased burden to meet the expectations of various often competing planning efforts in which they must participate. By consolidating relevant meetings into coordinated case planning sessions, family and staff time are more efficiently used toward achievement of a common goal.

Each of the participating agencies should hold onto their roles and responsibilities at these meetings. By working together, not only the families, but also the CWS and CalWORKs representatives can define the goals and values that everyone holds in common. Collaboration helps simplify the expectations for the family by integrating these perspectives into one shared vision. Services to meet this objective can then be developed in partnership.



### PRACTICE TIP

Meaningfully involve the CalWORKs worker as part of the Child & Family Team. By collaborating as team members, patterns in the family’s progress can be identified, such as the competencies a parent builds in both arenas through participation in parenting classes. Not only are they learning better skills to care for their child, but they are also learning how to be on time and apply learning from one environment to another. These are valuable skills for work readiness.

### 13. Be flexible about using other mechanisms for coordination beyond formal multi-disciplinary team meetings.

Communication in team meetings is only a fraction of what it takes to be effective in addressing family needs. Often the best work is done through more informal exchanges once the basic plan has been put into place. For example, some teams have set up email exchanges or group chats to keep everyone up to date. Others use sub-teams that work together on specific tasks and then report back to the larger group. Some teams that include family members and workers use texting to share information. One of the keys when assessing a family's strengths, culture and preferences is to look at how that family communicates and build the team's coordination system around that model.

#### PRACTICE TIP

The synergy that families experience through Linkages can come from simple, yet powerful coordination efforts. For example, a parent spent time volunteering in her child's school. On the CWS side, she picked up valuable parenting skills and saw herself doing well with her child. On the CalWORKs side, the hours spent at the school were counted as WTW activities.

## Case Plan Coordination – A Matter of Clarity

The simplest way to coordinate case plans is to exchange the individual case plans, so that the CWS worker knows what the CalWORKs worker is doing and vice versa. This helps the family avoid being caught in the middle. If there are contradictions, or if families are suddenly expected to be in two places at once, those issues can be quickly resolved. This also helps both CalWORKs and CWS avoid duplication of efforts and ensure expectations are compatible across the two plans.

Another approach some workers use is to create a coordinated case planning document by making four columns with the following headings:

- “What we hope to accomplish” (the shared goals of the three partners)
- “What the family will do to help accomplish it”
- “What CWS will do to support the family”
- “What CalWORKs will do to support the family”

Usually, this document is set up for one or two short-term goals and actions so that the family is clear about what will be going on this month, when it will happen, why it is taking place and who will be doing what.

A few counties have developed an integrated form that meets the requirements of both CWS and CalWORKs, so there can be a single coordinated plan for the family.



## MONITORING AND ADAPTING

The role of case managers in both CalWORKs and CWS involves a combination of encouragement, support, monitoring and intervention. The system-related responsibilities of these workers do not change when they work in teams. However, they are able to balance these responsibilities more effectively when they are operating collaboratively.

### **14. Celebrate family accomplishments to boost their confidence to tackle more complex goals.**

Jointly monitoring a family's progress gives a more holistic view of their growth. A parent's accomplishments toward employment goals can support their readiness to tackle milestones in their parenting objectives—and vice versa. Sometimes the CWS elements are abstract—such as learning how to be a more nurturing parent. In contrast, the CalWORKs tasks tend to be more clearly defined—this is how you prepare a job application, and this is where you file it. Parents can gain a rapid sense of accomplishment by checking off some of the small steps of the CalWORKs plan. Then use that increase in self-confidence to help them complete the more complex tasks in their CWS plan.

### **15. Conduct ongoing screening for a family's participation in or potential eligibility for CalWORKs throughout the CWS case lifespan.**

A family's economic circumstances can change at any time, which may open up the possibility of CalWORKs eligibility and more resources to help stabilize the family. Several decision points in the course of a family's involvement with CWS create chances to consider how the benefits of CalWORKs may help provide an essential safety net for the family. For example, CalWORKs housing assistance may be available for a family in Family Maintenance or if a child is removed from a CalWORKs family, many benefits can continue.

The more CWS and CalWORKs staff work hand-in-hand, increased awareness of safety and economic issues for the family will be addressed. Especially in times of economic downturn, a CWS worker may begin working with a family that is not eligible for CalWORKs, but as a result of job loss, may become eligible during the time of the CWS involvement.



### PRACTICE TIP

Increasing CWS staff awareness of basic eligibility criteria for CalWORKs benefits strengthens the way in which child welfare agencies can be responsive to a family's needs. Several counties have created a straightforward screening tool or simple set of questions that engage families in identifying their potential eligibility for CalWORKs benefits. This approach can be used flexibly at any point when the threat of poverty appears to be influencing the safety and stability of a family—at the time of referral, during ongoing case management, or at case closure. Such techniques require minimal training of child welfare staff yet are important methods for connecting families with benefits to which they may not realize they are entitled. Some counties have also trained CalWORKs staff to act quickly when a family has been pre-screened and referred to apply for CalWORKs or other economic benefits by their child welfare colleagues. This expedites the intake and approval process for families known to both systems.

### 16. Review CalWORKs status factors (e.g., sanctions, exemptions) that may impact the parent's ability to engage in service activities.

Access to additional benefits, services, and supports available through CalWORKs can help engage the parent in cooperating with needed service activities. Economic issues and failure to meet certain requirements for income assistance may pose significant barriers to a parent's ability to participate in their child welfare case plan. Through communication, coordination, and joint review of the family's situation by the Linkages team, often these administrative barriers can be lifted.

For example, while a parent of an infant may be exempt from participating in WTW activities, the Linkages team can encourage them to volunteer to participate, limit their activities to those that are part of the child welfare case plan and gain access to the services and supports offered through CalWORKs.

Likewise, sanctioned parents with an open CWS case can receive CalWORKs WTW services at any time regardless of the time remaining in their sanction period. Any sanctions or penalties can be addressed through the coordinated case plan, so when reunification occurs, the parent is no longer penalized.

This kind of coordination is better aligned with family's current challenges and needs, plus assists families in achieving safety and stability. It also establishes a more realistic pathway toward successful reunification, supported by economic and overall family stability.

## TRANSITION AND AFTER CARE

Providing enough ongoing support to ensure that the efforts supported by the coordinated plans are sustained following formal system involvement is essential to long-term success.

### **17. Help the family to connect with a community network of services and supports prior to ending system involvement.**

The connections that CalWORKs and CWS establish and maintain with community based organizations, specialized service providers, and family support resources are key benefits that a family gains through Linkages. Having a positive service experience while supported by their Linkages team can help parents gain confidence to utilize these community resources on their own following case closure. This is where collaboration with CalWORKs to help families gain economic stability can actually become a protective factor against future risk of maltreatment during the stressful times that families inevitably face.

### **18. Manage the possibility of one of the plans continuing for a time after the other has concluded.**

Often families complete the goals of their CWS and WTW case plans on different timelines. Anticipating these milestones in the life of a case becomes a natural part of ongoing Linkages case coordination. Preparing for smooth transitions when one set of resources are concluded is important for sustaining family stability. While the family's Linkages involvement has ended, any residual needs can be met through adjustments to the remaining case plan.

This is where strategies used in the primary and secondary prevention levels of Linkages may again be relevant. Connecting families to community-based supports, information, and resources that build their parenting skills and promote the protective capacity of their family can help keep children safe and families stable in the months and years ahead.

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**Share these guidelines widely with your staff, team and partners to encourage a common approach to supporting Linkages families. As Linkages practice continues to evolve in California, these guidelines will serve as a foundation for integrated practice. Family engagement remains our touchstone as we work in partnership to help families grow and thrive.**

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# Summary of Guiding Principles

## Engagement

These principles are fundamental for effective family engagement practice when CWS and CalWORKs are working together to meet families' needs.

- 01** **Involve the family in all matters pertaining to their future.**
- 02** **Value and reinforce consistent communication and persistent collaboration.**
- 03** **Share a strength-based, family-centered, trauma-informed approach to practice across both service systems.**

## Assessment

Understanding the family's needs, strengths, circumstances, and history through the lens of their involvement in CalWORKs and CWS can often shed new light on both the realities and opportunities in their lives. This not only engages the family in a more comprehensive way, but also helps determine the most appropriate service response from a family-centered, strength-based, and trauma-informed perspective.

- 04** **Determine whether a family is involved in the other program at the time of intake.**
- 05** **Explore the family's strengths, needs, and goals in the context of child safety and family stability.**
- 06** **Collaborate between CWS and CalWORKs to inform safety planning for mutual clients.**

## Service Planning and Delivery

After gaining a joint understanding of family needs, continued coordination to prioritize the appropriate service response ensures families receive the most comprehensive array of services to address child safety and economic stability.

- 07** **Help families prioritize child safety and economic stability needs to focus service planning efforts.**
- 08** **Adhere to standard confidentiality requirements.**
- 09** **Utilize court ordered case plans to motivate client participation in Welfare to Work (WTW) activities.**

## Coordination and Care Management

Although CalWORKs and CWS have different requirements for the case plans they must produce, working together to coordinate these plans can prevent conflicts, reduce redundancy, and take maximum advantage of the resources and supports available through both agencies.

10

**Establish basic knowledge about the mission and services of the other program across caseworkers, supervisors, and managers.**

11

**Coordinate child welfare case plans and WTW plans to improve a family's chances for success.**

12

**Transform existing case planning meetings into coordinated case planning sessions.**

13

**Be flexible about using other mechanisms for coordination beyond formal multi-disciplinary team meetings.**

## Monitoring and Adapting

The role of case managers in both CalWORKs and CWS involves a combination of encouragement, support, monitoring and intervention. The system-related responsibilities of these workers persist when working in teams. However, when operating collaboratively, these roles are enhanced toward achieving more effective results for families.

14

**Celebrate family accomplishments to boost their confidence for taking on more complex goals.**

15

**Conduct ongoing screening for a family's participation in or potential eligibility for CalWORKs throughout the CWS case lifespan.**

16

**Review CalWORKs status factors (e.g., sanctions, exemptions) that may impact the parent's ability to engage in service activities.**

## Transition and After Care

Providing enough ongoing support to ensure that the gains families have made through Linkages collaboration are sustained following formal system involvement is essential to long-term success.

17

**Help the family to connect with a community network of services and supports prior to ending system involvement.**

18

**Manage the possibility of one of the plans continuing for a time after the other has concluded.**



Child & Family Policy Institute of California

A publication of the  
**CHILD & FAMILY POLICY INSTITUTE OF CALIFORNIA**

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