



Evaluating County Linkages Models

Using the Linkages Case Review Tool



RDA Consulting

- A mission-driven, employee-owned, majority woman-managed, full-service consulting firm established in 1984 in Oakland, CA
- Works within and across public safety net systems on program design, fund development, planning, implementation, and evaluation
- Supports counties and community-based organizations of all sizes and geographic and demographic complexity
- Practices continuous learning around inclusive, culturally responsive planning, evaluation, and community engagement
- Brings a firm of 22 consultants plus partners who bring necessary subject matter expertise to tailor our work to the local context and to meet the ongoing needs of each engagement



RDA
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40 YEARS
of Systems Change



Workshop Purpose

- Provide counties with practical guidance for administering the Linkages Case Review Tool
- Strengthen collaboration between CalWORKs and Child Welfare Services
- Support counties in evaluating their Linkages implementation



Learning Objectives

- Understand the structure of the Linkages Case Review Tool
- Learn how counties can administer the tool
- Practice reviewing cases and identifying collaboration
- Interpret results to improve Linkages implementation




Workshop Agenda

- 1. Context & Overview: Why Case Reviews Matter**
- 2. Steps for Administering the Tool**
- 3. Interactive Case Review Exercise**
- 4. Interpreting Findings**
- 5. Reflection and Next Steps**



SECTION ONE

Context: Why Case Reviews Matter to evaluate Linkages?





Why Conduct Case Reviews?

- Understand how collaboration works in practice
- Identify strengths in cross-system coordination
- Detect gaps in service alignment
- Support continuous program improvement

What does it measure?

- ❖ Information sharing
- ❖ Joint case planning
- ❖ Service coordination
- ❖ Worker communication
- ❖ Documentation of collaboration



Key Domains of Collaboration



Eligibility Determination

Streamlining access and verifying qualifications.



Sharing of family needs

Open communication for holistic support.



Joint monitoring of case plan services, activities, and participation

Collaborative oversight and tracking.



Coordinating objectives and services in case plan(s)

Aligning goals for unified action.



Child and Family Team meetings

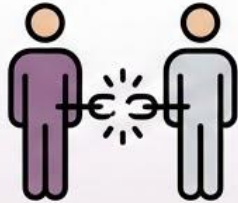


Recommended services



Levels of Collaboration

Level 1: No Collaboration



Description

The phase/activity did not happen.
There was no communication or shared collaborative effort; no formal, intentional interactions took place.
Both parties worked on the phase/activity separately & decisions were made independently.

Examples

Family needs were not shared between staff and all decisions regarding family needs were made separately.

Level 2: Some Collaboration



Description

Some information was shared and both parties made an effort to work together on the phase/activity to enhance efficiency.
Formal interactions took place, but communication was indirect or infrequent.
Some shared decision making took place.

Examples

Family needs were shared, staff communicated via email at least once and some decisions regarding family needs were made jointly.

Level 3: Full Collaboration



Description

The phase/activity was integrated and there was an intentional effort to ensure the phase/activity made an impact wherein frequent communication was categorized by mutual trust and consensus was reached on all major decisions.

Examples

Family needs were shared, joint discussions of needs took place on multiple occasions, and most case plan activities were decided on jointly.



SECTION TWO

Administration of Case Review Tool








Steps

1. Select Cases
2. Assemble Review Team
3. Review Case Files
4. Record Evidence



Case Review Process





Step 1: Select Cases

-  Review 10-20 Linkages cases
-  Include a mix of case types
-  Prioritize cases active within the past 12 months

Step 2: Assemble the Review Team

-  CalWORKs supervisor
-  CWS supervisor
-  Linkages coordinator

Step 3: Review Case Documentation

-  Case notes
-  Case plans
-  Service referrals
-  Evidence of worker communication

Step 4: Record Evidence

-  Use collaboration scales
-  Standardize response formats



Example Case Review Question

Were family needs shared between systems?

What types of documentation might demonstrate this?



SECTION THREE

Interactive Exercise





Interactive Exercise

- Participants review a sample Linkages case
- Apply questions from the case review tool
- Identify evidence of collaboration



Case Review Questions

1. Sharing Family Needs

- a. Was information about the family's needs shared between CalWORKs and CWS?
- b. What documentation shows that information was shared?

2. Service Coordination

- a. Were services coordinated across systems?
- b. Did services address both safety and economic stability?

3. Worker Communication

- a. Did CalWORKs and CWS staff communicate directly?
- b. Is communication documented?

4. Joint Case Planning

- a. Is there evidence that workers jointly discussed service plans?
- b. Were referrals coordinated?

5. Documentation

- a. Is collaboration clearly documented in case notes?
- b. What evidence supports collaboration?



Group Discussion Questions

- What evidence shows collaboration?
- What coordination practices occurred?
- Would you rate this no, some, or full collaboration? Why?
- What could have improved coordinated case planning?



SECTION FOUR

Reflection & Next Steps



Tips for Administering the Tool



1. Adapt to County Processes

Tailor the tool's language and structure to align with local workflows and specific county procedures.



2. Clarify Indicator Definitions

Establish precise, shared definitions for all data points to ensure consistency and shared understanding among reviewers.



3. Capture Collaboration

Update the tool to specifically track and measure whether and how collaboration took place between agencies.



4. Train & Calibrate Staff

Conduct comprehensive training and regular checks to ensure interrater reliability and consistent application of the tool.



5. Use Data for Improvement

Analyze results to identify barriers, share key learnings, and plan actionable process improvements for the Linkages program.

Following these steps ensures the Case Review Tool is a valuable asset for strengthening program outcomes through effective administration and data-driven insights.



Using results to strengthen Linkages



Improve
staff
training



Strengthen
communication
protocols



Enhance
joint case
planning



Support
program
improvement
efforts



Reflection questions

- What practices are working well in your county?
- Where can collaboration improve?
- What actions will you take after this workshop?
 - Utility of the tool?



Thank you!