DCSS P3 PROJECT
TRAINING WORKGROUP
AUGUST 24, 2000 MEETING
MEETING SUMMARY

A. GENERAL

On Thursday, August 24, 2000, the California Department of Child Support Services (DCSS) Policies, Procedures, and Practices (P3) Project, Training Workgroup held its third official session in Sacramento. The following members attended:

- ☑ Doris Keller, State Co-Leader (DCSS Training Unit)
- ☑ Debra Paddack, County Co-Leader (Analyst---Sonoma)
- ☑ Ann Love, State Analyst (DCSS Analyst)
- ☑ Pamela Korman, County Analyst (Manager---San Bernadino)
- ☐ Sharon Quinn, Small County Rep (Senior DDA---Placer)
- ☐ Mary Leibham, Medium County Rep (Manager---Stanislaus)
- ☑ James Martinez, Large County Rep (FSO Supervisor---Fresno)
- ☑ Nora O'Brien, Advocate (Director, ACES)
- ☑ Gloria Clemons-White, DCSS, Training Unit
- ☐ Pat Pianko, Resource (OCSE Rep---Region 9)
- ☑ Michael Wright, Judicial Council Rep (Senior Attorney---AOC)
- ☑ Louise Bayles-Fightmaster, Judicial Council (Sonoma County Specialist)
- ☑ Ed Kent, FTB Rep (Child Support Specialista)
- ☐ Stan Dettner, FTB Rep (CCSAS Child Support Specialist)
- ☐ Peter Dosh, FTB Rep (Supervisor ---Child Support Collections Program)

Attending *ex officio* were:

- ☑ Julie Hopkins, Facilitator (SRA International)
- ☐ Kathie Lalonde, Facilitator (SRA International)
- ☐ Nancy Bienia, Resource (OCSE Rep---DC)

This meeting summary highlights points covered, material discussed, and decisions made, and follow-up tasks for forthcoming sessions. Comments and corrections should be addressed to Julie Hopkins at julie.hopkins@dss.ca.gov.

New Attendees in the Training Group:
- Ed Kent, FTB
- Louise Bayles-Fightmaster

Clarification - Doris Keller's phone number: 916-263-4728

New Co-Leader Needed: Congratulations to Deborah Paddock who has earned a promotion and will begin her new position with Sonoma County Health Services prior to the next P3 Training Workgroup session.

County members of the training workgroup may express their interest in Deborah's vacated position by contacting Doris Keller by e-mail at Doris.Keller@dss.ca.gov or by phone at (916) 263-4728.

B. REVIEW OF LAST MEETING'S MINUTES

Doris Keller opened the meeting with a discussion of the group's accomplishments thusfar, and the direction in which the group would be moving. Several members of the group were not present, because of other commitments. The group discussed whether to add an additional session to our schedule, so that we could devote more time to the development and completion of the group's report. Everyone agreed that an additional session was necessary; Doris and Julie will determine the most appropriate date, and will advise the group via e-mail.

C. TODAY'S TENTATIVE AGENDA

1. FSO Certification
   - Successful completion of core courses
   - Multi-levels of certification based on ability
   - Methods to ensure standardization statewide
   - Certification of courses
   - Certification of instructors
   - Certification of training programs (County, Junior College, University Extension, etc.)
2. Certification for other Classifications of Workers
3. Training Materials Listing
   - Format: Table of Contents; Index
   - Who maintains the listing?
   - Methods to ensure timely updates
   - Who should have access to the listing?
4. Full Training Survey
   - Additions or deletions of information
   - Arrangement
   - Allowances for counties to use "Not Applicable"

D. FAMILY SUPPORT OFFICER CERTIFICATION

The group began a discussion of the certification process for Family Support Officers. It was agreed that FSOs should be certified; numerous issues would need to be addressed before this could happen.

Some of the initial questions or issues that the group identified were:

- What is a certification program?
- Who administers?
- Is there a review process of the courses included?
- State should develop lesson plans.

- Can staff test out? Or can staff be grandfathered?
- What to do with long time employees who do not pass certification? One year probation? Three strikes to take test? Promotional test exists in Fresno. What should be on test?
- What about new staff? San Bernardino provides 6 weeks of training, hands-on, to new staff. They test at end of 6 weeks; if don't pass, monitored closely during work by supervisor. Sonoma has two major training courses per year for 180 staff. Fresno wanted to establish paralegal school/courses to encourage staff to qualify to get raises.
- FSO failing certification process – how to handle? Probation
- How to handle veteran employees?
- Union issues
- Everyone required statewide to test? - won't work because clerical is used differently in different counties
- Will state develop curriculum? For consistency, yes. For stamp of approval, yes.
- BSA recommendations indicated that DCSS needs to assist & improve county training programs.
- Look at training programs out there in the counties and evaluate them, take what's good & develop for statewide
- Tasks should be uniform for all counties. Problem comes in for different size counties. One person doing 40 tasks and in another county 40 people doing 1 task each.
- State needs to get message to counties that training is clearly being led by the state. Maybe state should control any funding counties use to develop new training via the cost control process for budgets.
- How to prevent or deal with those counties who want to do it their way? Test at end of module to be administered by the state. Regional administrators may play a role. Develop test online to make it uniform & give state control.
- State to approve any county developed training
- One year probation – How long is course? Union gives you 1 year to let someone go. Look at time frame for course, give person time to take core courses for 3-4 months. You can't just let someone go until the end of the year and say they're doing fine, they don't pass the cert. and then let them go.
- Retraining and refresher courses need to be taken into consideration for certification. Online evaluations.
- May be big responsibility to certify someone within first year probation. Within 6 months, you should have a good idea of a person's ability. Within 6 months, a person could be trained & certified in core courses.
- State can't conduct all of the training.
- Ability of staff to work in county in county/state on rotational basis.

As noted above, there are substantial issues with regard to veteran employees vs. new staff. The group felt that discussion should be limited to identifying those issues, and then moving on to the certification program itself, with a focus on new staff. It was recommended that probationary issues be included in our draft survey: probation process in each county; length

of probation; role of probation in promotion process; completion of probation and salary increases.

What topics should be included in the core course certification?

- You can't teach/learn all the nuances of child support the first time around, but you should cover the basics. Staff should know there are more advanced steps, and courses should be provided for this – outside of the core certification.
- Have DCSS use Federal/ CDSS TOT courses & incorporate subject matter info.
- Regional approach to training—TOT ongoing

FSO Certification Program Requirements:

- Testing required to obtain certification.
- Mandatory statewide.
- Courses should be available to other staff, for professional development and promotional opportunities.
- State to use / revise existing training material (per audit & recommendations) to develop new curriculum as needed
- Delivery by variety of trainers: state, federal, county, community colleges, private (occurring now)
- TOT state course required; state evaluations required.
- State funds development and tracking of certification program; Counties fund delivery.
- Various levels of certification will be available. Need to examine if this will be linked to pay scales or promotions.
- Union issues will have to be identified and addressed.
- Recommendations are needed on the timeframe for certification. Consider probation and union issues. When should statewide certification requirement be in place? By what date?
- Program will have both core classes and electives.
- Initial certification will cover entire caseflow (to address differing county organizational structures).
- Even after certification is earned, there will be a need for refresher/ update training -- "recertification"
- Two levels of certification will exist:
  - Beginning ("Level One") – covers entire processing of a case. Upon completion, FSO will be able to identify and handle basic case issues. Will also have an awareness that more complex issues exist, and be able to identify some of these.
  - Advanced ("Level Two") – also covers entire scope of case processing. Upon completion, FSO will be able to identify and handle all case issues, including exceptions. Certification at this level assumes certain knowledge, skills and abilities prior to taking courses associated with this level.
- Time frames for level one and level two certification need to be determined. Tie to promotion/ salary.

There was some discussion of how new staff training is handled in different counties. For example, in Sonoma, when you pass probation, you become FSO II. The group examined the 1410 survey information that had been compiled, to see how training is accomplished in various parts of the state. Because of staffing levels, training is handled very differently throughout the state.

Pam Korman provided a description of San Bernardino's new staff training program. New staff receive training, formal and on the job, for 6 months, and must pass first level by mastering skills in 6 months to pass probation. Formal training is given for 6 to 8 weeks during this six months. At the second level, the FSO must handle more difficult cases, and has 6 months to obtain skill mastery. During this time, he/she receives training in modules for 3.5 months. They receive a module of training, and then apply it through on the job training. This process continues throughout the training period.

CS Officer Trainees
- 6 months probation
- Skills mastery
- 6-8 weeks
- Upon successful completion, become a Child Support Officer
- 10% loss of staff during 6 months

CS Officer
- 6 months probation
- Skills mastery
- Module training, followed by OJT
- 5% loss of staff during this time

The group liked this training program, and agreed that it should serve as the basis for the FSO Certification Program. Further discussion on this program was tabled until all the group could review the information provided on Maryland's worker certification program.

E. STATEWIDE STANDARDIZATION AND CERTIFICATION OF COURSES

There was general recognition among the group that there are a lot of great training materials out there; there is no need for the State to reinvent the wheel in this area. However, there must be a process in place for the State to approve and control training. Our recommendation will be that the counties be required to receive certification of their training programs by the State. This could be accomplished through the DCSS Training Unit, that would review county training programs for standardization and compliance with policies and procedures. Once approved, the program would be shared with other counties, for their use. To accomplish this, the DCSS Training Unit must have autonomy in certifying programs and workers, whether county or state. The Training Unit would answer to Director of DCSS. The Training Unit could begin certification of courses as follows:

- Survey/ask counties if they have a training program. Have counties submit training plan or outline of their training program if they have one.

- Plan for phase-in of training – counties include training component in their transition plan for certification. If no plan available, state will provide.
- Certification Requirements for county training plans. – Next session to discuss. ACTION ITEM.
- Certification requirements need to be publicized to counties.

F. CERTIFICATION OF OTHER WORKER CLASSIFICATIONS

We began a discussion of the other classification of workers that may require certification. There was considerable discussion in this area. The group differentiated between mandatory certification and mandatory training. Mandatory training for staff had already been identified in our previous session.

No Certification Required:

- Attorneys
- Supervisors, Managers, Directors
- Clerical & Support Staff
- Fiscal
- Investigators
- Paralegals
- DCSS and FTB Staff
- Mandatory county-site (field) training for state workers was considered. Some staff should have local field experience based on the job they perform at the state.

Certification Program Required:

- Family Support Officers – new and veteran
  - Cannot be used to reward or punish.
  - Call it mentoring program or staff development to alleviate union issues.
  - Union issue – Grandfather in current staff at their level. New staff must take exams. Grandfather at certain level & must test to move up. Test based on years of service. In lieu of certification training. If they don't pass test, they have to go through the training program until they do pass. Golden handshake.
- Trainers - county and state

G. CERTIFICATION OF INSTRUCTORS

It was widely agreed that all instructors, whether county, state, federal, community college, etc., should meet some certification standard. While those outside the DCSS and county purview could not be subject to our specific certification requirements, there should be some uniform standard to be applied to their qualifications as well.

- Trainers should receive education based training, from training needs assessment through development and delivery to evaluation. Specific child support training would not be required, as standard child support training materials would be

developed. Examples would be the OCSE Training of Trainers course. San Bernardino developed its own TOT based on the Federal 5D model.
- Counties and State would have the ability to send whomever they wanted to develop as trainers.
- To be determined: requirements/credentials required of outside instructors
- RFPs on training to incorporate standard credentials requirements
- Offer county trainers Training & Development positions to contract with the state for 2 years to move to state or work regionally to train county staff
- Temporarily assign county trainers to DCSS.

H. TRAINING MATERIALS LISTING

We then began a discussion of how to provide a listing of all the training materials that will be available. The group agreed that the DCSS Training Unit should be the repository for all of the training materials, whether state or county. All updates, changes, or new training materials would be approved and maintained by the Training Unit. The Unit will need to poll all training resources, to identify and gather all the materials that are available.

Recommendations for the Training Materials Listing/Repository:

- All materials should be available on online; anyone should have access to pull the material off the web.
- All materials are available in PDF format.
- Comprehensive, centralized listing/repository of all available training materials
- Include all county, state and community college training schedules so neighboring counties could utilize other counties' training
- Encourage on-line courses CD-ROM/ CBT videos
- Certification track info
- Schedules/ locations of "outsourced" courses
- Training conferences, if available/continued. These should be set up as training courses (FSO college) not conferences. Examine format.
- Recommendation: all counties need a computer for each staff person. Include this question in survey.
- Environmental Scanning Program – staff who look at media to see what's going on in the world of child support. Updates, informational bulletins put out on the website as well.
- On-line policy manual.
- Small counties might have video conferencing with state's equipment that resides in that county until new staff are trained.
- Broadcast training one way with a set-up link to one county. $90,000 per county.
- Maintained by Training Unit.
- Access – training officers at county level, state training unit, counties w/o formal training programs. Bottom line: anyone who has an interest or need to know, whether state, county, judiciary, or public, should have access to the listing, either by the intranet or internet.

Timely Updates to Training Materials:

- 2 way communication capability: case law, policy changes
- web-master control info on site review prior to posting
- change in font color when revisions/ modifications are made to training

I. TRAINING SURVEY

In preparation for our review of the draft full training survey, the group reviewed the materials that Ann Love had prepared on training methodology and cost effectiveness. Some of the discussion topics are noted below:

- Not enough students for local college to put together child support program training classes.
- UC Davis extension did develop courses
- Very expensive for colleges to prepare courses in child support.
- Are there legal courses already available?
- Standards vary among instructors on developing courses.
- Who takes courses? Hopeful employees in community? County would only pay for their staff. If taught in college, it would be open to community?
- Can a community college be asked to give a certain course at a certain time? Yes. But it is controlled by when there are new staff. What if trg is scheduled in January and new staff will not all be hired by then? -- You can have in-house training and outside training.

We agreed to review this material in more depth, as well as information provided in workgroup binders, prior to our next session. At that session, we will review the training survey in order to develop a finalized product. That product should perhaps include some of Ann's material on methodology and cost effectiveness. In addition, we need to consider the following questions, which were also mentioned by the Steering Committee:

What do we hope to accomplish with certification? What is certification?

- Can you take classes and not do any practical work and pass certification?
- Certification may include passing work probation on job and completing & passing training?
- What about for new hires vs. grandfathered staff?
- OJT/ practical classroom only sufficient?

J. CROSS-WORKGROUP ISSUES *[To be submitted to the Scribe for inclusion in the minutes by Mary Leibham and James Martinez, both assigned to track these issues]*

- Performance Measures – What is turn-over rate for staff? What turn-over may be attributed to normal attrition? Add to our survey? What is retention rate?

- James and Mary are still working on other cross-over issues

K. SYSTEM REQUIREMENTS *[To be submitted to the Scribe for inclusion in the minutes by Pete Dosh, assigned to track these requirements]*

No system requirements were identified

L. HANDOUTS

- Agenda
- Letter from county of Mendocino to Mendocino College
- Training Workshop for Child Support Commissioners and Family Law Facilitators, Volume 2 Training Manual
- CFSC Strategic Training Plan
- Curriculum Plan: Child Support Enforcement Professional, Maryland Child Support Enforcement Administration
- Other States' Training Programs
- Cost Effectiveness of Different Types of Training
- Draft County Training Survey

M. ACTION ITEMS/HOMEWORK ASSIGNMENTS FOR NEXT SESSION

- See attached listing

N. ANCILLARY (PARKING LOT) ISSUES

- None

O. ATTACHMENTS

- Action Item List

P. TENTATIVE AGENDA FOR SESSION FOUR

- Housekeeping -- name workgroup county co-lead
- Completed draft survey -- distribute survey with member comments incorporated
- Brainstorm the mission and recommendations
- Brainstorm/Discuss the possible product
- Discuss Style Guide -- division of work to draft the product
- Outline contents of the product