

# *Lessons from “Moving Up”*

## **South Carolina’s Employment Retention and Advancement (ERA) Program 2001 – 2005**

*by*

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## Introduction

Our ERA (employment, retention and advancement) program “Moving Up” operated in a rural six-county area of South Carolina, called the PeeDee. The program began in September 2001 and ended in May 2005. The Moving Up pilot was part of an ERA research demonstration program sponsored by the DHHS Administration for Children and Families (ACF). An important feature of “Moving Up” was that sample members drawn from eligible welfare “leavers” in the Pee Dee were randomly assigned to either a treatment group or a control group, for evaluation purposes.

In our Moving Up program, our case managers, called “career consultants”, contacted former FI (Family Independence) clients in the treatment group, and tried to engage them in the program. Almost half of the people in the treatment group were engaged in the program. Our career consultants worked with clients on employment goals and were able to offer financial incentives to help people reach their goals. Funding was also available for training and education programs, support services (such as transportation) and support groups, and referrals to other treatment providers for problems such as substance abuse, if needed. (Additional program description is provided in Appendix 1).

Moving Up clients had the full range of personal barriers, job skill and experience problems, and educational deficits as welfare clients everywhere else. In addition, the Pee Dee faces high unemployment rates. In five of the six Moving Up counties, the unemployment rate has been in double digits the last few years – and two of the six counties often occupy two of the highest unemployment spots in the state, at or near 20%.

Over the five-year pilot, we have learned from our weaknesses as well as from our strengths and successes. We have generated knowledge throughout this pilot project that is valuable, and can help others manage programs designed to help clients find employment, retain their jobs, and/or advance in their careers. The purpose of this paper is to share that knowledge with those who design and implement ERA programs, and with ERA case workers.

First and foremost, the most important lesson is to hire the right people, offer them good training programs often, and actively supervise what is going on in their cases. Where this is done, we believe the program can be of significant value to clients. We provide recommendations in this paper for ways to hire the right people, and then, recommendations for providing good training.

ERA casework is very demanding, and requires the proactive and purposeful efforts of mature, skilled and caring individuals. Even then, progress is usually slow, as Ruby K. Payne (1996, *Bridges Out of Poverty*) describes: *"Adults assisting individuals from the culture of survival should not be discouraged if the impact on the majority of their clients seems to miss the mark. Short-term goals, small steps that stretch into larger accomplishments, little celebrations of new insight or mini-successes.... these are the milestones of the low-income adult who takes on the challenge of transcending economic class. And these also must be the benchmarks for those who assist them. Perhaps the journey is just as important as the destination."*

We provide guidelines for managing cases well, and recommendations for managing the casework process through automation. Our systems for automating the dictation process through ERACTS, and for managing the notifications processes through our ALERT system, are described in the paper (and in Appendix 2.)

We are putting what we have learned from our ERA pilot program into practice by integrating the ERA model into a TANF program in Marion County. A description of how that will be accomplished concludes the paper.

Examples of inadequate case management (Appendix 3) show how resources can be spent and efforts can be made that do not improve employment prospects, stabilize families, or make meaningful differences in client lives. Our examples of good case management (Appendix 4) illustrate how much a client can benefit from the efforts of a capable case manager.

## Hiring Staff

*If the people you hire to be case managers have the right characteristics, your program is off to the best possible start. Our experience tells us that in a demanding program like ERA, it is almost impossible to correct for inappropriate hiring decisions (other than by replacing workers). Here are some considerations and recommendations that should help you hire the right staff, and get off to a good start.*

Use a skilled person or team of persons to evaluate and hire workers based on desired education, characteristics, and skills, such as those listed below. Use behavioral questions in interviewing<sup>1</sup> (pose situations and ask what the interviewee would do in each situation). Set minimal educational requirements, such as degrees in psychology, social work, counseling or similar areas. Make sure that you hire someone who is effective interpersonally and has a strong desire to help clients. Hire staff that can facilitate groups or can be trained to facilitate groups. **Bottom line: Hire the very best person you can get for the job.**

### **Characteristics and Skills of an ERA Career Consultant**

*When you conduct interviews, look for these characteristics and skills.*

1. Good “common sense” and maturity.
2. Strong helping attitude.
3. Good interpersonal and relationship-building skills. Relates well to clients and to employers, and works well in a team.
4. Conscientious about doing a good job, a “get-up-and-go” kind of person, and not a procrastinator.
5. Organized and professional.
6. Problem solver and innovator.
7. Skilled in assessment and in counseling.
8. Skilled in setting goals and in follow-up.

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<sup>1</sup> For in-depth information about Behavioral Interviewing, and how to use these techniques to hire the best person, we recommend the articles you will find at these web links:

[http://www.ksu.edu/hr/emp\\_eff\\_behav\\_inter.html](http://www.ksu.edu/hr/emp_eff_behav_inter.html)

<http://denver.bizjournals.com/denver/stories/1997/11/17/smallb2.html>

[http://www.nfib.com/object/IO\\_16988.html](http://www.nfib.com/object/IO_16988.html)

9. Capable and conscientious about documentation.
10. Capable in required computer skills, including on-line research for jobs.
11. Willing and able to work flexible hours.
12. Knowledgeable about community resources and how to make an effective referral.

### **Interview Outline**

1. Explain job duties and go over job description.
2. Discuss benefits and salary.
3. Explain that the job requires a vehicle; go over rules for use of state vehicles.
4. Discuss training requirements.
5. Review past experience and jobs.
6. Ask if there will be any problems with a SLED (law enforcement) check.
7. Go to questions about skills and abilities.

### **Questions about Skills and Abilities**

*Ask for real examples or training experiences whenever possible. Remember, you are looking for mature, "personable" individuals with good common sense. You need to feel confident that they will be proactive and caring in their client contact, and thorough and organized in managing cases.*

1. How would your previous supervisors describe you as a worker? (Ask them to give examples of why the supervisor would say what they said, and request specifics).
2. What type of skills do you bring to the job? (Request specifics and get examples of each skill or ability.)
3. Are you a talker or a listener? Describe.
4. Have you held jobs where you worked as a member of a team? Give some examples of how you have used teamwork to get things done.
5. Did you get any awards for performance in former jobs? Did you come up with any innovations in your last job to do things better?
6. How would you describe your writing skills? (Request a sample, if available).

7. How would you rate your organizational skills? (Request examples of past work.)
8. Describe your approach to keeping up with large amounts of work. (Ask how s/he would keep up with 60 home visits per month.)
9. If you had a deadline approaching and you saw you might have a problem meeting it, what would you do?
10. How well do you do in keeping up with paperwork? (Request examples)
11. In any type of job, most people have some type of conflict. Can you give an example of how you have successfully handled conflicts on the job in the past? (What would your past supervisors say about how you handle conflicts?)
12. If you worked with clients in a past job, describe the work you did. How well did you relate to the clients? Please describe specifically how you helped them.
13. Would you rather interview clients in their home or in the office?
14. How comfortable would you feel talking to an employer about helping a client get a job, or about a problem your client was having on the job?
15. Describe your computer skills. Do you know how to look up jobs on the Internet?
16. Do you think you would prefer using a computer or writing to keep up with notes from your cases (i.e. dictation)?
17. What would you do if your job placements were not as high as other workers?
18. What would you do if you were having trouble getting clients to come to the door when you made home visits?
19. If you observed a situation where a client's children were being neglected or abused, what would you do? If a client had a medical problem that kept them from working? Needed medicine? Had a problem with an older adult? Had a problem with domestic abuse?
20. Clients may be at our front door at 8:30am in the morning to see their caseworker. How would your former supervisors rate you in being on time in the morning and/ or in keeping appointments with clients?
21. Occasionally we have to work overtime. Is there anything that would prevent you from doing this? How do you feel about working after hours?

## Training Staff

*Training should be on-going, and should take place often enough to reinforce information and skills over time, such as (ideally) every month or two months. However, it is better to provide top quality trainers and excellent curricula less often, than to bring in mediocre trainers who will bore workers, and end up wasting time.*

*Two training consultants we recommend are Jodie Sue Kelly of Cygnet Associates and Liz Fabiano of the Cognitive Connection. Jodie Sue Kelly trained Moving Up staff in “Marketing To and Engaging Post-TANF Clients” and in “Advancement and Retention Strategies”. The Cognitive Connection provided intensive training in “Motivational Interviewing”, and “Negotiating Behavior Change”. This training focused on developing relationships with clients, talking to clients using specific techniques, and helping clients set goals towards new jobs or higher paying jobs.*

1. Train staff on how to engage clients, market the program, and motivate clients.
2. Train staff on the computer software set up to record activity and contact data.
3. Train staff on worker behaviors that help people obtain jobs, keep their jobs or advance. Train staff on interventions to help overcome obstacles such as problems with supervisors, support services and referrals.
4. Use role-modeling and other “active” training techniques, including on-the-job mentoring, so that new workers have a clear idea of what successful case management looks like, and can learn new skills through modeling.
5. Staff should be trained in developing written short-term and long-term goals with clients. Low-income clients need short-term, step-by-step written goals to progress, and they also need specific praise and recognition for meeting those small goals. We found that verbal praise helped motivate clients to higher levels of achievement.
6. Three “must-read” books for staff working with clients in poverty are "Framework for Understanding Poverty", "Bridges Out of Poverty: Strategies for Professionals and Communities", and "Hidden Rules of Class at Work", by Ruby Payne.

“The American Dream” by Jason DeParle is also highly recommended. This book follows the casework experiences of three clients in Milwaukee, Wisconsin, and illustrates the experience and costs of inadequate case management.

### **Setting Strong Performance Standards**

1. Set performance standards, and ensure that caseworkers understand the performance that is expected of them.

2. Ensure that supervisors are reviewing caseworker performance against the standards on a routine basis and are providing clear guidance and feedback to caseworkers. Supervisors should read caseworker notes and dictation to evaluate case progress, in addition to discussing (and “brainstorming”) the case with the worker.
3. The ERA program coordinator should ensure that supervisors are keeping up with their responsibilities, and that they have the authority and support they need to enforce job standards.
4. Be willing to move staff out of the program early in the project if they do not meet performance standards and/ or do not appear to understand, or benefit from, training.

### **Managing the Program**

1. Ensure that the project’s Policies and Procedures are clearly articulated in a manual, including specific and detailed policies on allowable Support Services, i.e. “what can the project pay for, on behalf of clients?”
2. Develop a workflow process for engaging and working with clients, with worker standards for processing clients through the system.
3. Provide responsive technical support for PC’s and for software problems and questions.
4. A program supervisor should be readily available to answer questions about policies, procedures, and allowable activities and/or expenses, and to get things fixed quickly or make referrals.
5. Make sure supervisors receive the same training as workers. Supervisors should have similar educational background and skills. Supervisors should be performance-oriented and knowledgeable of and efficient in the use of the project’s software programs. Train supervisors on the importance of consistent implementation of policies and procedures.
6. Have monthly or bi-monthly meetings with staff, with a strong training agenda as well as an opportunity for staff relationship strengthening and support. Meet regularly with project supervisors.
7. Develop a plan for staff turnover and for training new staff.
8. Require that project staff is limited to project duties only. Project management should have control over the use of staff.

9. Program budgets should be centrally managed, rather than by individual counties, (assuming that program sites are located in different counties).

## **Automating Records and Record-Keeping**

1. *Use PC software to automate record-keeping tasks*, such as ERACTS (Employment, Retention, Advancement Case Tracking System) - our networked computer program. Arrange for case workers to use PC's for dictation of service delivery and description of case progress (including client contacts, referral tracking and client follow-up, described below). Keep paperwork to a minimum.
2. *Systems such as ERACTS that allow review of worker dictation are very powerful in monitoring and evaluating staff performance.* ERACTS allows Moving Up Career Consultants to enter dictation quickly and easily. Short-term and long-term goals should be noted in the case dictation, along with timelines. Case notes provide a history of where the client and worker have been in the process and where they are going. It provides an order for moving from step to step in the process and allows worker to keep up with and manage numerous cases - to know what they did on each case and how they need to proceed.

Recording “the client’s next step” and “the worker’s next step” help workers to keep on track with the client’s progress towards their short-term and long-term goals. When a worker is unable to visualize the next step for the client or what they need to do next for the client, consultation with and direction from a supervisor is clearly needed.

Any TANF/ ERA program manager should be able to read the case dictation, and tell where the client has been in the process and where they are going. From a management standpoint, it allows supervisors a convenient way to review cases and to make suggestions for improvement. When dictation is input on a PC, supervisors can see patterns of service delivery throughout the worker’s caseload, enabling them to see if the worker is discerning important issues and managing cases effectively. (See examples of case dictations in Appendices 3 and 4).

3. *Client and service tracking:* In addition to recording dictation, ERACTS allows workers to track caseloads, employments, referrals to other agencies, expenditures for services, and client demographics. From a management standpoint, ERACTS provides an easy way for the “Moving Up” project coordinator and supervisors to review progress in a large number of cases within a short period of time – compared to wading through stacks of paper files and manually pulling records.

The Moving Up project coordinator can check approximately 800 active records in three days, facilitating feedback to workers and staff about service issues. (Make sure that services are categorized, in records of service delivery.)

4. ***Automated client follow-up using Alert software.*** This is a very powerful casework tool when caseworkers are responsible for keeping up with many different types of follow-up actions with clients. Coordinating follow-up is especially important when caseloads are large. Trying to keep up manually with the tremendous numbers of tasks that need to be completed can be overwhelming to staff and can slow progress for clients. Failure to follow-up with clients usually results in poor program outcomes. Using a PC program that alerts workers to follow up with clients can mean the difference between an effective and an ineffective program.

## **Learning about Jobs**

1. Develop a systematic method for disseminating available jobs in your area.
2. Have a centralized person gather job information (Internet) and disseminate to staff on a weekly basis. (One person saves a lot of man-hours collecting and dispersing job information)
3. Make sure staff are using the job listings and getting information to clients on a regular basis.
4. Have staff establish relationships with not only large industries, but also, with small businesses - especially in rural areas.
5. Have staff share information about jobs from county to county.

## **Newsletters**

Use newsletters to “advertise” success stories and market the program to clients and top management. Share the project’s accomplishments through the newsletter, and distribute it every two to three months to clients, prospective clients and staff. We used the newsletters to share “human interest” stories that reflected the program’s success in improving the lives of clients and families. Many clients were motivated to become active participants because of the success stories they read in the “Moving Up” newsletters. The newsletter was a tool that yielded significant results with this program.

## **Case Management Guidelines**

### **Providing Good Assessments in Employment Services**

***Effective ERA caseworkers are able to evaluate the reasons why clients aren’t working, or why they work sporadically.***

A skilled caseworker should be able to understand why a client went through 10 jobs in a two-year period, or why a client can’t get a job in the first place. Developing a true understanding of these reasons takes good communication skills, the ability to establish

trusting relationships and experience with the problems faced by the client population. The use of assessment tools may also facilitate this process, such as health inventories, substance abuse diagnostic tools, and risk assessments in the home.<sup>2</sup>

Caseworkers who are not just “going through the motions” understand that there are reasons why clients can’t get jobs or can’t keep them, usually involving more than “a bad attitude” or low skills and education. Effective caseworkers understand that assessing these reasons is an important part of their job. Failure to address these issues wastes program resources, clients’ time, and the efforts of everyone involved. The opportunity to refer the client for needed treatment or for some other type of assistance is lost.

Barriers to employment may be hard to get at, such as whether the client has suffered abuse or domestic violence leading to depression and difficulty in functioning. It is important for caseworkers to understand the effect of family problems, mental or physical health problems and intellectual or functional disabilities on gaining or maintaining employment. We are not suggesting that caseworkers function as psychiatrists or psychologists. However, developing good relationships with clients and an understanding of their behavior and history, and effectively ameliorating barriers are all part of the job.

## **Guidelines for successful case management**

*Providing your case managers with these guidelines should help them understand the importance of a proactive and involved approach to their work with clients.*

1. Establish a good working relationship **by helping the client understand you really care** and will help them any way you can.
2. **Thoroughly assess the client’s work history**, and social history so you will know what types of jobs might work out best. Assess his or her emotional and physical health and history. Refer them for professional assessment or treatment, if needed.
3. **Be curious about client problems.** Help them with decision-making and brainstorming solutions, not only with jobs, but also with needs such as home repair, finding a new apartment or help with their children’s school or other problems.
4. **Ask clients about their fields of interest**, and listen carefully, so you can route them into jobs that will match their interests and skills.
5. **Coach and encourage clients with the positive message** that they can get a meaningful job (or at least a better job) and that will help them and their family.
6. **On the initial visit, complete the Plan for getting a job.** This will save an extra visit and eliminate having to make another appointment with the client to complete

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<sup>2</sup> For a helpful review of assessment issues and tools for working with TANF and ERA clients, see: Kramer, Fedrica D. (2001) “Screening and Assessment for Physical and Mental Health Issues that Impact TANF Recipients’ Ability to Work”, Welfare Information Network [Issue Notes](#), Vol. 5, No. 3.

- the Plan. Workers should **immediately begin working on the Plan** (to get and keep the client's interest) with the client that day or the next day. Follow up with the client to see whether he/she followed through with his or her responsibility.
7. **Praise and positively reinforce clients when they follow up** or do things that help them progress in their plan. If they call you, praise them for calling. Encourage good behaviors through positive praise and conversation.
  8. **Help clients get training in skills** that will help them get a good paying job or better job. If the client doesn't have a GED or high school diploma, determine whether this is a reasonable and useful next step – given the client's work interests and abilities.
  9. **Help clients access community resources** and remove barriers through the provision of support services, such as childcare, transportation and Medicaid.
  10. **Help clients with specific tasks.** Don't just tell the client what to do or where to go. Actively assist them, or even do it for them, to model the behaviors you want them to learn, and to show them that they can trust you. By establishing trust, you can influence clients to make better decisions. You can move responsibility for tasks to them over time, to foster independence and self-confidence. **Take the client to available resources** and "advocate" for the client. Agencies may ignore clients who come in on their own, while you can get their attention and help with services.
  11. **Do immediate follow-up and then, follow up with clients weekly** about progress. Make sure you stay in regular contact with the clients to keep them from losing interest and momentum. Periodically reinforce the fact that you are concerned about their well-being and are interested in helping them.
  12. **Contact clients at the times when they are supposed to be home.** Caseworkers may need to call after hours or give clients a pager or cell number to call after hours. Staying in contact with the client is very important, to show personal concern and interest for what is happening in the client's life. **If you leave a message on an answering machine or with someone else, make sure to specify the reason for your call.** If you leave a message and the client does not call you back, call again.
  13. **Make sure clients have well-designed resumes.** The worker should write the resume with the client, so that the client learns how to do it.
  14. **Instruct and coach clients on what to say and what not to say during interviews.** Do this (again) right before they have an interview.
  15. **Pull up all available jobs in the area** and help unemployed clients explore these jobs to see if they qualify. This should be done on a weekly or bi-weekly basis. **Make sure you are very knowledgeable** about the types of jobs available locally. Encourage and help clients to get training in those fields.

16. **Call area employers to see if they have any openings.** This is especially important with small businesses that do not post with Job Service.
17. **Take clients to Job Service and One-Stop Offices** and “walk” them through the process.
18. **Establish a relationship with the “temp” agencies** and call them periodically about hiring.
19. **Encourage clients to network** in the community about available jobs. **Workers should also network with community contacts** to find out about available jobs.
20. **Be on the watch for new construction** that would indicate new businesses coming to town and find out who will be doing the hiring and when. Contact them.
21. **Establish Job Support Groups.**
  - Use Job Support Groups to network jobs, promote the program with clients, and engage clients.
  - Make sure caseworkers are well-trained in Support Group facilitation.
  - Provide child care, and transportation if necessary. Provide refreshments and ensure that the meeting room is reasonably comfortable.
  - Conduct follow-up with clients who attend, to see what could be improved about how the support groups are conducted, where and when, etc. Use this information to improve operations and attendance.

### **Integrating the ERA model into TANF Programs**

We learned in Moving Up that retention and advancement services can be effective and can improve clients’ outcomes over the long-term. Getting a job is only a first step – maintaining the job, and moving up in wages, benefits and stability is what ERA was designed to do. While employment services are offered in FI (Family Independence, South Carolina’s TANF program), services addressing retention and advancement have not been offered, nor has there been an FI outreach program to clients once their cases close.

Marion County (one of the six Moving Up counties) is innovating an important change in the way the FI program operates, based on what was learned in the ERA pilot program. The ERA caseworker (called a Career Consultant) will assist the Family Independence E&T (employment and training) staff with finding appropriate employment for FI clients who are assessed as “ready to work”. When the client’s FI case closes due to

employment, the ERA Career Consultant (hereafter referred as the CC) will make face-to-face contact with this individual.

The purpose of the meeting will be to begin to establish the same type of working relationship that was created in Moving Up in order to assist the client to obtain or retain employment, and/or advance in employment. The CC will review available support services, determine client and family needs and will serve as a liaison to both internal and external service providers. The frequency and intensity of contact will depend on client needs, generally ranging from weekly to monthly.

The goals are not only to help stabilize the client in employment and to move towards career advancement, but also, to prevent a return to the FI program. Sometimes intervention services are needed when problems arise at work, at home, or with health. Helping employed clients over these “bumps in the road” can prevent disruption of employment, and a subsequent return to the FI program. With the CC providing services and support to the former FI client, the goal is for the client to stay in the job market and not to return to active FI status.

The costs are high when former FI clients return to the program. They “start over” and must again comply with FI program requirements or risk sanctions. Clients expend more of their months towards the State’s 24-month time limit (in a ten-year period) and the Federal five-year limit (in a lifetime). Once these months are spent, the client is faced with obtaining and retaining employment without the support of the FI program. From the state’s perspective, the FI program is expensive, given monthly stipends, and staff time and resources to administer the program and to fund or provide support services.

The Marion County ERA program will retain the use of support groups, which were important in the development of the Moving Up program. As previously described, Moving Up clients met monthly to discuss job opportunities and to share their thoughts and experiences on the challenges of working and of the work place. The groups offered clients a comfortable forum for support and validation. The CC will continue to meet with the members of the MU group that wish to participate and will add FI / ERA clients.

The implementation plan for Marion County FI/ ERA is to first engage clients who left FI due to employment, and then returned to FI. Next, the program will reach out to clients who exited the program due to time limits. The post-welfare wages of time-limited clients are much lower than those who left for earned income, reflecting the fact that clients who reach time limits are more disadvantaged (i.e., less able to work, and/or less able to earn a “living wage”). This will be a challenging group to work with, but clearly a group likely to benefit from post-welfare services. Finally, another relatively disadvantaged group, sanctioned clients, will be offered assistance through FI/ ERA.

Recidivism in the FI program is assessed by tracking the number of clients that leave the program and subsequently return. In order to assess the effectiveness of the FI/ ERA program in Marion County, we will determine if the FI/ ERA program is effective in

reducing recidivism over time, and for which type of clients. We will also track employment, retention and advancement data for program clients.

We believe that the Marion County program will serve as a model to the rest of the state, and that we will see other counties implementing and experimenting with their own ERA services as part of “the second phase” of TANF.

## Appendix 1

### **“Moving Up” Program Description**

“Moving Up” was an Employment, Retention, and Advancement demonstration project of the SC Department of Social Services and the US DHHS Administration for Children and Families (ACF) to help former welfare clients find jobs, retain their jobs, or advance in their careers. Evaluation by MDRC will answer questions about "what works best" in contributing to long-term gains for low-income families. Moving Up combines strategies such as post-welfare employment training, counseling, follow-up and supportive services to help members gain self-reliance. The program began in June 2001 and, as of February 2005, was serving 2,413 members in six “Pee Dee” counties of South Carolina.

Program activities focus on “getting a job - keeping a job - getting a better job”. Services include:

- Qualified job referrals
- Job-placement counseling
- Solving transportation and child care problems
- Retention strategies
- Job advancement planning
- Education and training such as:
  - Work readiness training
  - On-the-job training
  - GED preparation
  - Continuing education courses at technical schools
- Referrals and assistance:
  - Treatment for substance abuse, mental health problems, domestic violence
  - Vocational rehabilitation
  - Money management
  - Medicaid, physical health problems
  - Legal Aid
- Follow Up Services
- Financial incentives for engagement, and for meeting training, retention and advancement goals

Members could not choose to "join" the program. The 2,413 eligible members were randomly selected and invited to participate by one of the career consultants in the six Pee Dee counties: Marlboro, Marion, Chesterfield, Darlington, Dillon, and Florence. To receive support services, the family income had to be under 250% of poverty and the member had to have dependent children in the home. Members were helped to recognize and solve problems in maintaining their current employment. They were assisted in developing skills and strategies that may have led to a better position, better wages, and working conditions, job satisfaction and benefits.

Data on the "Moving Up" Project  
(June 1, 2001 - February 1, 2005)

As of July 1, 2003, the "Moving Up" caseload was 2,413, and remained at that level until February 2005. One hundred members were added to the project each month (10 per Career Consultant) until the program reached the maximum caseload level.

Over 70% of the members that we were able to locate participated as active members at some point in the project.

- Clients in the experimental group obtained 1,860 jobs since being added to the program.
- Members that moved them from a previous job to a new job with better wages obtained 636 jobs.

Job Support Groups were successfully implemented in Chesterfield, Darlington, Dillon, Florence, Marion, and Marlboro counties. These groups provided peer support to share job information and resources, to find out what works from successful peers to find jobs and advance to better jobs. Over **700 clients** participated in the Support Groups.

**Some of the Positive Aspects of this Research Project to Members.**

1. Over 30% of the February 2005 Active caseload was clients that were Sanctioned or Time Limited cases in the Family Independence Program.
2. Approximately 17% of these Moving Up cases were either current CPS (child protective services) cases (as of February 2005) or former cases that received CPS. The program has helped provide work-related services to these clients.
3. Had an economic impact on children and families by helping clients obtain jobs, keep their jobs, or help them advance to higher paying jobs or jobs with benefits.
4. Provided short-term training that will have a long-term impact on members and families.
5. Provided a model for future employment-related service activities at SCDSS and tested services such as the Job Support Group; ("Moving Up" provided one of the first trials of this method in employment-related services at SCDSS.)
6. Assisted clients who were not successful in the Family Independence Program due to participation or other requirements.
7. From a research standpoint we are finding out what works in engaging clients in services that they cannot connect to on their own or with their own resources. We are

finding that many former welfare clients must be helped and assisted through the system to be successful.

8. We are discovering that many clients that repeatedly lose jobs over short periods of time have severe barriers such as drug abuse, alcohol problems, learning disabilities, or that they were abused as children (and/ or as adults) and suffer from mental health problems such as post-traumatic stress syndrome, anxiety disorders or depression.

## Appendix 2

### **The Employment, Retention, and Advancement Case Tracking System (ERACTS)**

ERACTS is a unique database system that is run on a network through Lotus Notes. All “Moving Up” Career Consultants had laptop and desktop computers that were networked to enable them to enter client data. The system was set up as a paper-less system. (Due to the necessity to use other forms, however, this was not entirely the case.) Client-identifying data was downloaded into the system by State office staff. Career Consultants were then able to enter and record all contacts with client, which required minimal data entry. Workers could view their contacts either by client or by date. There are fields on the database that allow extra notes and documentation.

Staff also recorded:

- a. Benefit Information
- b. Employment Information
- c. Services
- d. Expenditures
- e. Incentives
- f. Extended Memo documentation

System activity and reports have been available for management staff online at any time.

Information can also be exported to spreadsheets and other databases to view data.

This is a very important tool for managers to monitor service activity, either through monthly reports or by viewing individual client service delivery. When workers document cases thoroughly, managers can readily track client progress (or lack of progress), enabling them to better staff cases and promote positive outcomes.

## Appendix 3

### Examples of Inadequate Casework

We illustrate inadequate casework by reproducing three sets of dictation on (recently) active clients, below. You can readily see the problems with these cases by reading through the dictation. In some cases, it appears that caseworkers “drop in” on people’s lives and record some of what is happening over a period of time, without offering any real assistance (other than incentives.) Again, *it is up to supervisors and County Directors* to pay attention to these cases, and correct the problems. Sometimes correcting the problems may involve reassigning caseworkers to another type of work.

#### DICTATION ONE

***A plan was started in this case, but there was no plan of action as to what the client was to do or what the worker needed to do to complete the plan.*** There were no next steps, no mention of service delivery by the worker, no mention of helping the client get a GED, no mention of any other barriers, and no mention of her present situation at work - whether she wanted to stay or find another job. No follow-up on transportation problems, despite the fact that the program offers support services. There is no dictation as to the disposition of the case, and no comment on what they found out from the FS case.

Date: 05/06/2003

Contact: Mail

Success: Yes

comments: Invitation letter mailed.

Date: 05/12/2003

Contact: Other Contact

Success:

comments

Date: 05/12/2003

Contact: Face to Face - Home

Success: Yes

comments: Ms. B was home. She work part time at Champus in housekeeping the company name is One Source. She just started working about a month ago. Has no transportation she has to relied on some one to take her back and forth to work. She was getting ready to leave when I got there. I told her that I could come back another time. We agreed to meet on May13, 2003 @ 10:00.

Date: 05/13/2003

Contact: Face to Face - Home

Success: Yes

comments: Plan was signed Ms. B works she wanted to go back to school to get her GED or High School Diploma. She would like to go into the Medical Field. She understand that get into the Medical Field she must have her High School Diploma or GED.

Date: 05/20/2003

Contact: Mail

Success: Yes

comments: Referral information.

Date: 07/16/2003

Contact: Mail

Success: Yes

comments: Mailed group invitation letter.

Date: 07/17/2003

Contact: Face to Face - Home

Success: No

comments: Home visit, Ms. B was not at home, I talk with her daughter, I left some information for her with her daughter.

Date: 08/13/2003

Contact: Mail

Success: Yes

comments: Mailed Group Letter

Date: 09/08/2003

Contact: Telephone

Success: No

comments: Telephone disconnected or no longer in service. Last time I talk with Ms. B she was working part-time. Food stamp case is open with income so it appears that she is still employed.

Date: 09/17/2003

Contact: Mail

Success: Yes

comments: Letter for the group meeting.

Date: 09/24/2003

Contact: Face to Face - Home

Success: Yes

comments: Ms. B was home, said today was her only day off and she was sleeping late, will call me back later. She did tell me that she change jobs. She now work at Southland still in housekeeping.

Date: 10/08/2003

Contact: Mail

Success: Yes

comments: Newsletter.

Date: 10/21/2003

Contact: Face to Face - Home

Success: Yes

comments: Home visit Ms. B was home said she work part-time at Health South on South Dargan she walk to work. Would like to go to school but work on a as need basis. she pick up extra hours when some one is out or on sick leave. She would still like to go into the Medical Fieldshe needs to get her GED or High School Diploma.

WNote: I will try and send her some information from Poynor as to when they give the GED Pretest.

CNote: She also need to contact Poynor about the class.

Date: 11/06/2003

Contact: Mail

Success: Yes

comments: Letter mailed letting her know that I have a gift card for her for becoming a MUP member.

Date: 11/06/2003

Contact: Face to Face - Home

Success: Yes

comments: Home visit no one was home.

Date: 11/17/2003

Contact: Face to Face - Home

Success: Yes

comments: Home visit. Ms. B was home I gave her gift card for singing a plan and for the initial home visit. She was give a \$20.00 gift card.

Date: 11/24/2003

Contact: Face to Face - Home

Success: Yes

comments: Home visit was made I went to give Ms. B Gift cards that were due her because of employment. She given a total of \$150.00 for working 1 months, 3 months and 6 months. She hopes to soon get full time.

Date: 11/24/2003

Contact: Telephone

Success: Yes

comments: Ms. B call said she receive the note I left for her the other day and she was on her way home.

Date: 12/05/2003

Contact: Mail

Success: Yes

comments: Invitation to Group Meeting

Date: 12/11/2003

Contact: Face to Face - Home

Success: No

comments: Ms. B was not home.

Date: 01/22/2004

Contact: Other Contact

Success: Yes

comments: Chips has a new address for client

Date: 01/22/2004

Contact: Face to Face - Home

Success: No

comments: Home visit was made it appears that no one lives in the apartment. I ast talk to her late November or early December 2003.

WNote: Check CHIP to see if she has an open FI or Food Stamp case and see if there is another address.

## **DICTION TWO**

*The following example shows that the caseworker tried to use the telephone, rather than to set up personal face-to-face contacts.* It is hard to see where the worker tried to help the client address or overcome employment barriers. The worker took ten months to finally set up a face-to-face interview. The worker should have been making home visits in the first month to contact the client, or should have called after working hours to set up an appointment. Follow-up was not timely. Months passed between contacts.

Substantively, this client reported significant problems with transportation over the course of the case, which were never addressed. Eight months after initial contact, reference is made to a CPS (child protective services) case, but there is no further mention of the situation. Ten months into the case, the worker reflects in dictation that the client has a profoundly disabled child. The child is in a wheelchair and cannot speak. Many services are available for caretakers of disabled children. If the career consultant did anything to help with either transportation or with support and services for the child, that was not recorded in the case notes. In addition, TANF benefits are available for adult caretakers of disabled children. The caseworker should have noted why this client lost her TANF benefits, and why she (apparently) was not qualified to go back on TANF.

Date: 01/06/2003

Contact: Mail

Success: Yes

comments: Initial Letter Sent.

Date: 02/10/2003

Contact: Mail  
Success: Yes  
comments: Sent info RE 2-19-03 Job Fair at Florence Civic Center.

Date: 03/06/2003  
Contact: Mail  
Success: Yes  
comments: Sent info RE MB job fair

Date: 04/03/2003  
Contact: Telephone  
Success: Yes  
comments: Clt left message. She's interested in transportation assistance.

Date: 04/04/2003  
Contact: Telephone  
Success: No  
comments: No ans

Date: 04/04/2003  
Contact: Telephone  
Success: No  
comments: No ans

Date: 04/07/2003  
Contact: Telephone  
Success: No  
comments: Line not working

Date: 04/07/2003  
Contact: Telephone  
Success: Yes  
comments: No ans

Date: 04/09/2003  
Contact: Telephone  
Success: No  
comments: Phone not working

Date: 08/07/2003  
Contact: Other Contact  
Success: Yes  
comments: Per Gail, CPS case is closed.

Date: 09/23/2003  
Contact: Other Contact

Success: Yes  
comments: FS worker gave employment info

Date: 10/03/2003  
Contact: Mail  
Success: Yes  
comments: Re-engagement letter sent.

Date: 10/06/2003  
Contact: Telephone  
Success: Yes  
comments: Clt called in response to re-engagement letter. Cz she works at Heritage Nursing Home. She's been there for about a year. Cz she'd like to go to a residential home. Cz she doesn't have GED; she was going to school for GED but transpo was a problem. Cz she has a car but no drivers license and car needs repairs. JYA to do HV on 10-7-03 to complete plan.

Date: 10/07/2003  
Contact: Face to Face - Home  
Success: Yes  
comments: Plan completed. Clt has 1 1/2 yr exp in housekeeping; she has been at current job for 6 mo. Transpo is problem -- clt doesn't have license; she has car but it needs repairs. Clt's son is disabled physically & mentally. Clt doesn't have GED.

Date: 10/08/2003  
Contact: Face to Face - Home  
Success: Yes  
comments: Plan completed. Clt has been doing housekeeping at current job for 6 mo. Clt completed 8th grade. Clt would like to work in a nursing home setting. Clt has car but no driver's license; car needs repairs. Clt has a disable child -- he is in a wheelchair and can't talk.

Date: 11/14/2003  
Contact: Face to Face - Home  
Success: No  
comments: No ans

Date: 01/14/2004  
Contact: Other Contact  
Success: Yes  
comments: Alt # -- the person that answered said that I had wrong #.

Date: 01/14/2004  
Contact: Telephone  
Success: No  
comments: Alt # -- Wrong #

Date: 01/14/2004  
Contact: Telephone  
Success: No  
comments: Number has been changed to a non-published number.

### **Dictation Three**

***This case is similar to the preceding case, in that there is no evidence of an action plan, no next steps, little assessment of barriers.*** No help was offered to the client in returning to school. No follow up of services other than information on IDA, newsletters and invitation to a support group.

Date: 10/01/2001  
Contact: Mail  
Success: No  
comments: invitation letter mailed.  
WNote:  
CNote:

Date: 10/10/2001  
Contact: Telephone  
Success: Yes  
comments: Was able to contact Ms. C by telephone. We schedule a face to face for October 12, 2001.  
WNote:  
CNote:

Date: 10/12/2001  
Contact: Face to Face - Home  
Success: Yes  
comments: Ms. C was at home. She wants to participate in the program . Her only income is from child support. She states she will reapply for fi benefits. No High School Diploma. She wants to return to school. Maybe night school.  
WNote:  
CNote:

Date: 11/13/2001  
Contact: Mail  
Success: Yes  
comments: news letter mailed  
WNote:  
CNote:

Date: 11/28/2001  
Contact: Telephone  
Success: Yes  
comments: Spoke with Ms. C. Asked if she decided if she want or was going to reapply for for FI benefits and she said she had already applied. Check chip system on application since August 2001.

WNote:

CNote:

Date: 12/13/2001

Contact: Mail

Success: Yes

comments: SEASON'S GREETING.

WNote:

CNote:

Date: 01/31/2002

Contact: Mail

Success: Yes

comments: NEWS LETTER.

WNote:

CNote:

Date: 03/26/2002

Contact: Mail

Success: Yes

comments: Information about the IDA Program.

WNote:

CNote:

Date: 10/07/2003

Contact: Mail

Success: Yes

comments: Invitation Letter / Newsletter.

WNote:

CNote:

## Appendix 4

### Examples of Good Casework

#### Summary 1 – Good case work

*(This case was summarized by caseworkers' supervisor:)* The client called Caseworker x for help in finding a job. They discussed her work experience and Caseworker x asked her what job she liked the best. The client told Caseworker x her best job was at Shoney's working as a waitress. She really liked it but had problems getting along with the supervisor so she ended up quitting (note: she received no help there with job problem resolution). She had had other jobs in the past but just didn't like them as much. Caseworker x discussed with her why she liked it at Shoney's and talked to her about reapplying there. The next day she called Caseworker x as the client had gone by Shoney's, applied for a job, and had gotten the job to start that Monday. It is unlikely that she would have reapplied, if Caseworker x hadn't encouraged and helped her.

Some workers would have sent her to Job Service or perhaps provided a job list, but it is active and involved casework that counts in this job. It takes a worker who will listen and then give helpful advice and encouragement, as well as providing support services in an active way.

*Liz Fabiano (The Cognitive Connection) says that if you do it right, clients will think they got the job on their own.*

#### Summary 2 – Good case work

*(This case was summarized by the caseworker)*

Presently client is an active MU member with DSS. Client became active in the MU program on 10/4/01. At that time, client was a single parent of two small daughters. Client was unemployed and was living with her parents. Client did not have her High School Diploma or GED, but completed the 10<sup>th</sup> grade.

During the first year that client was in MU, it was observed that she seemed to have difficulty making basic decisions (changing her mind) and with job search. Also, it was observed that she made little eye contact and seemed somewhat withdrawn (hung head down or put hand in front of face as if to hide) when talking with MU Career Consultant (CC) about employment. The MU CC placed client on several jobs. However, the client maintained the jobs only for a short while before quitting. After counseling with client about retention and job skills, it was felt that client seemed to have difficulty working with people due to her being so withdrawn and shy and would become discouraged and fearful to continue the job.

During a staffing of the case it was decided that the worker needed to explore the client's past in more detail to try to find out what could be behind some of her behavior. It was decided that MU CC would show the client all the jobs she had gotten and lost over the last two years.

After talking and counseling with client at her home, client was able to express her feelings and share with MU Career Consultant that she had been sexually molested at the age of ten years old by a male relative (not immediate family) that was 19 years old and that she still thinks about the incident. While talking about the sexual abuse, it was observed that client became very emotional (crying) with no eye contact and head down. Client stated that she felt "shameful". Client stated that she did tell her mother about the incident, but that her mother wanted the client to be quiet about the sexual abuse. However, client stated that she did tell her siblings, who in later years ridiculed the client if she were to mention the incident.

Client agreed that she had difficulty concentrating, staying focused and making basic decisions and agreed to a Psychological Evaluation. The evaluation indicated presence of a learning disability along with post-traumatic stress disorder, related to her dysfunctional childhood. Client was then prescribed medication to help with the post- traumatic stress disorder and was referred for out-patient treatment. The medication helped but the client refused other treatment, such as counseling or therapy.

Since then client has not worked, but married a man that client states has a good job and is able to support her and the children. MU CC met with client's husband and observed that he seemed very nice and a good provider for client and children. Client and husband had a new baby in October 2004 (three daughters). Also client received her High School Diploma with Cornerstone Correspondence School. Presently client is home with new baby, but plans to try job searching again after baby is older. Currently, client seems happily married and is financially stable, but it is recommended that she receive treatment for post- traumatic stress disorder. Client states that she is doing much better and will get treatment when she feels ready. It seems that client remains in denial about how much the abuse affects her in many areas of her life, but until she is ready, she will probably remain very busy taking care of her children.

## An Example of Good Casework Dictation

### Dictation Four

*This case started off with a Moving Up worker who documented contact with this client for over a year without any apparent understanding that the client was heading into a child protective services case; fifteen months into the Moving Up case, the client's three children were removed from the home.* The first caseworker left the program 18 months after beginning this case. The first caseworker does do a good job of "documenting contacts", which in many programs, is counted as "participation". *A second caseworker*

***picks the case up, and immediately begins offering services effectively, in a proactive and thorough manner.***

Date: 12/02/2002  
Contact: Mail  
Success: Yes  
comments: initial invitation mailed  
WNote:  
CNote:

Date: 12/05/2002  
Contact: Mail  
Success: Yes  
comments: sent invitation to 3rd Moving Up Support Group Meeting  
scheduled for December 9th  
WNote:  
CNote:

Date: 12/09/2002  
Contact: Telephone  
Success: No  
comments: no answer  
WNote:  
CNote:

Date: 12/09/2002  
Contact: Telephone  
Success: No  
comments: line busy...conti. effort  
WNote:  
CNote:

Date: 12/10/2002  
Contact: Telephone  
Success: No  
comments: no answer // cont to try to contact by phone also send  
follow up letter out  
WNote:  
CNote:

Date: 12/11/2002  
Contact: Telephone  
Success: No  
comments: tried in evening...still no answer  
WNote:  
CNote:

Date: 12/11/2002  
Contact: Telephone  
Success: No  
comments: line was busy...now no answer  
WNote:

**CNote:**

Date: 12/17/2002  
Contact: Mail  
Success: Yes  
comments: follow up letter mailed in an effort to engage member  
interest  
WNote:  
**CNote:**

Date: 12/18/2002  
Contact: Telephone  
Success: No  
comments: tried calling the number found in lcis// it is  
disconnected//  
WNote: cont. efforts// mail out a contact letter again  
**CNote:**

Date: 12/18/2002  
Contact: Telephone  
Success: Yes  
comments: answering party stated that this was not members home, she  
was not a family member nor did she have any information that could  
help me, she did not know members number// will try the only other  
number found so far  
WNote:  
**CNote:**

Date: 12/19/2002  
Contact: Mail  
Success: Yes  
comments: mailed another contact notice, offering incentive to call  
and explaining that she would be a part of the project even if she  
chose not to contact, however there were benefits available to her for  
participation  
WNote:  
**CNote:**

Date: 01/24/2003  
Contact: Mail  
Success: Yes  
comments: sent member contact in hopes of either engaging or re-  
engaging member's interest in the program  
WNote:  
**CNote:**

Date: 02/06/2003  
Contact: Mail  
Success: Yes  
comments: mailed invitation to member for MU support group meeting to  
be held monday  
WNote:  
**CNote:**

Date: 04/16/2003  
Contact: Mail  
Success: Yes  
comments: invitation to join us at the support group meeting was sent to member  
WNote:  
CNote:

Date: 06/20/2003  
Contact: Mail  
Success: Yes  
comments: mailed letter trying to engage member interest in program  
WNote:  
CNote:

Date: 06/23/2003  
Contact: Telephone  
Success: Yes  
comments: member called and we arranged a f/t/f visit for wednesday at 230  
WNote:  
CNote:

Date: 06/25/2003  
Contact: Face to Face - Home  
Success: Yes  
comments: finally met with member after last mailing brought a response// discussed the program and she is very intersted// she has just started work in housekeeping at Ramada, but has deep interest in CNA and later LPN training// she is also scheduled to interview and tour Harbor freights next week  
WNote:  
CNote:

Date: 06/30/2003  
Contact: Face to Face - Home  
Success: Yes  
comments: went by and talked to member about cna classes and lpn school// she also had some problems on her new job that we needed to discuss// she has not quit but not sure if she will stay  
WNote:  
CNote:

Date: 07/01/2003  
Contact: Other Contact  
Success: Yes  
comments: checked with sheriffs dept and got members criminal history for her process with olsten// member has several items on there, mostly bad checks from last year  
WNote:  
CNote:

Date: 07/02/2003  
Contact: Telephone

Success: Yes  
comments: member called and said that when she called in to find out about working today she was told she no longer worked there// she had called and told me about some trouble that happened sunday.// she said that her boss's wife called sunday and accused her of not cleaning any of the rooms she was assigned// she was upset saying that she had indeed cleaned those rooms// she states she vaccumed and did the beds and dusting as required, but they were saying the bed was not even made.// she says that the employer said they would not pay her for the work she had done// she has worked there for 6 days// the employer was not there but would be back in tonight// i suggested she call him and talk with him about her wages and what it is that they were unsatisfied with//

WNote:

CNote:

Date: 07/07/2003

Contact: Face to Face - Home

Success: No

comments: went by to pick up member but was told she wasnt home// i told them that she was expecting me and to have her call me if she would

WNote:

CNote:

Date: 07/07/2003

Contact: Telephone

Success: Yes

comments: member called and we are going to go to olsten this afternoon to try and get her on at harbor freight// she will start working at Super 8 tomorrow in the meantime// she said she got her check from the Ramada and they had paid her, but not all of it// at least she did get that

WNote:

CNote:

Date: 07/08/2003

Contact: Telephone

Success: Yes

comments: member called and said she would be starting her job in housekeeping again tomorrow// she will call on wednesday and schedule her new time to apply with olsten and will call and let me know how it went

WNote:

CNote:

Date: 07/11/2003

Contact: Telephone

Success: Yes

comments: member called and stated she had her interview with olsten today to apply for job at harbor freight..

WNote:

CNote:

Date: 08/18/2003

Contact: Telephone  
Success: Yes  
comments: general check in// member is still working // she is interested in the cna course that is going to be given at Dillon Applied Tech// she will have them fax me the information on it tomorrow when she goes to register  
WNote:  
CNote:

Date: 09/24/2003  
Contact: Mail  
Success: Yes  
comments: sent a personal letter to member touching base  
WNote:  
CNote:

Date: 09/29/2003  
Contact: Telephone  
Success: Yes  
comments: member called to let me know she is no longer working // was laid off because things got too slow// she is suppose to be going to Huddle house in the morning for an interview//  
WNote:  
CNote:

Date: 10/20/2003  
Contact: Mail  
Success: Yes  
comments: letter informing member of change in CC for Dillon// requested member call me before end of next week if possible to close out anything that might need taken care of before I go  
WNote:  
CNote:

Date: 10/22/2003  
Contact: Other Contact  
Success: Yes  
comments: faxed referral letter to Staffing Alliance for member to try for position at Quickie, a plant in Lumberton  
WNote:  
CNote:

Date: 10/22/2003  
Contact: Telephone  
Success: Yes  
comments: member is not yet working// she is trying to get on thru a temp service at Quickies in Lumberton//she needs a letter of referral  
WNote: fax letter of referral to Star Alliance at 910-739-6352  
CNote:

Date: 10/27/2003  
Contact: Telephone  
Success: Yes

comments: called member to make sure we were still suppose to go over tomarion this morning// she said yes, as we are trying to get her into housing there//

WNote:

CNote:

Date: 12/03/2003

Contact: Telephone

Success: Yes

comments: CC received a voice mail message from Ms. L and returned her call. Ms. L wanted to inquire about taking the GED prep classes. CC got some advice from Mr. J who stated Ms. L is to register for the GED prep classes, the adult education office will give her a bill and Ms. L is to bring the bill to DSS and the Moving Up project will pay the registration bill. Ms. L said she would do this.

WNote: Pay the GED prep registration fee when the bill is submitted.

CNote: Register for adult education classes and submit the bill to the Moving Up project. She is then to attend her classes.

Contact: Face to Face - Office

Success: Yes

comments: Client came by office to complete application for Cornerstone Correspondance school Test packet. Completed application. Informed for client to call when she recieves test. Client stated that she will. Gave client Marl. cc 's number to call.

WNote: Submitted 1269, application and birthcertificate to support service for check process. (Marl. cc)

CNote: Plans to notify cc when she recieves test.

ate: 12/10/2003

Contact: Telephone

Success: Yes

comments: Client called to inform that she will not be able to come by office until 3;00 pm today. Reminded client to bring her birth certificate or drivers license so that cc an make copy to attach to application for HS Diploma Test packet. Client stated that she will.

WNote: Rescheduled appt. to 3:00 today to assist with completing application for test packet.

CNote: Plans to come at 3;00 today rather than 1:30 to complete application for test packet.

Date: 12/10/2003

Contact: Telephone

Success: Yes

comments: Client called to inform that she wants to take the HS Diploma test with Cornerstone Correspondance School. Client informed that she has the application and wanted to see if MU can assist with the cost of \$65.00. Informed for client to come by office with application so to to sign 1269 form and make copies today at 1:30 pm. (Marl. CC)

WNote: Meet with client to assist with completing application for Cornerstone HS Diploma test packet.

CNote: Plans to come by office to complete application for test packet with Cornerstone Correspondance School.

Date: 01/14/2004  
Contact: Other Contact  
Success: Yes  
comments: Talked with Marion cc at Dillon office to get another number for client. CC gave another number , but called and it was a wrong number also.  
WNote: Plans are to mail letter asking for client to contact Marl.cc about her test from Cornerstone.  
CNote:

Date: 01/14/2004  
Contact: Telephone  
Success: No  
comments: Called client to follow up with her getting HS Diploma test from Cornerstone, but both numbers have been disconnected.  
WNote: Plans are to contact Dillon office to see if they have another number to contact client.  
CNote:

Date: 02/04/2004  
Contact: Telephone  
Success: Yes  
comments: CC phoned Ms. L and informed her for her request for gas service connection to be considered she will need to submit a bill or invoice from the gas company confirming the amount of the connection fee in her name at her present address and submit it to the receptionist at the Dillon County DSS office. CC told her that her request would be staffed and she would be notified of a decision regarding her request.  
WNote: When Ms. L submits confirmation of her gas connection service fee, staff it with Ms. J.  
CNote: Submit confirmation of the expense to have her gas service connected so her request for assistance to pay the fee can be considered.

Date: 02/04/2004  
Contact: Other Contact  
Success: Yes  
comments: CC consulted with Ms. J and was referred to Ms. K who referred CC to Ms. C. Ms.C reviewed the list of those individuals who had requested utility and housing assistance in the past and Ms. L's name was not among those who had received assistance during the past year and a half. CC was instructed to contact Ms. L and ask her to submit a copy of her bill for the connection of her gas service and her request would be considered.  
WNote: Contact Ms. L and ask her to submit a copy of her gas connection expense.  
CNote:

Date: 02/04/2004  
Contact: Telephone  
Success: Yes  
comments: CC received a voice mail message from Ms. L and returned her call. Ms. L said she would like some assistance in connecting her gas service and the deposit is \$200.00. CC advised her CC does not know

the procedure for such service in Dillon County but would inquire of Ms. J about the procedure for assisting with utility services in Dillon County.

WNote: Consult with Ms. J regarding the Dillon County DSS Moving Up project being able to assist Ms. L with her gas service connection.

CNote:

Date: 03/15/2004

Contact: Telephone

Success: Yes

comments: Client called the office to see if she was still eligible for child care assistance. Client believes she has months of transitional CC left.

WNote: Check with CC worker on child care for client. Call client back with an answer.

CNote: Find other alternatives for child care,(relative or friend). Check with day care centers about prices if can't receive transitional.

Date: 03/16/2004

Contact: Face to Face - Office

Success: Yes

comments: Client requested assistance with her moved in the amount of \$235.00. Moving Up has not assisted her in the past with rent or lights. Through further investigation it was discovered that client has an open CPS case at Dss which was investigated on 01-20-04. She is in treatment as of 3-5-04 with CPS worker Ms. D. Client is still employed at the present.

WNote: Assisted her with rent for March 2004. Encouraged client to budget herself carefully and to pay her rent on time, maintain employment. Follow up with CPS worker on client's progress.

CNote: Follow instruction from MU worker, stay in touch with MU, Abide by the guidelines set forth by the CPS worker.

Date: 04/15/2004

Contact: At Work

Success: Yes

comments: Worker transported client from work because lack of transportation. Client has been walking 5 miles to and from work each day . work hours begins at 6a.m. each day.

WNote: Try to help find transportation for client and provide assistance..

CNote: Search for transportation along with career specialist.

Date: 05/17/2004

Contact: Face to Face - Home

Success: Yes

comments: Transported client to a job interview at Wilco Plaza. Client is still employed at Bojangles part time. Told client to stay on job until she is hired at Wilco.

WNote:

CNote: Keep her present employment at Bojangles until she is hired at Wilco.

Date: 05/19/2004

Contact: Face to Face - Home

Success: Yes  
comments: CC and client will meet with manager at Wilco for a second interview for employment at 11:30 a.m..  
WNote: Work with client on interview skills for employment. Encourage client to answer questions truthfully that will be asked by the interviewer.  
CNote:

Date: 06/17/2004  
Contact: Telephone  
Success: Yes  
comments: CC called client to tell her that she may want to speak with the manager of Wendy's in Dillon if she plans to move to NC because it may be possible that she could be transferred to a Wendy's in NC. Client stated she will talk with the manager when she goes to work today.  
WNote:  
CNote:

Date: 06/17/2004  
Contact: Telephone  
Success: Yes  
comments: Client called requesting that MU purchase a bus ticket for she and her children to relocate to Charlotte, NC. Client does not have employment in NC and I told her we would only move her if she was going to a job. Client stated she just wanted to leave Dillon. Told client to let me know if she decides to move out of state.  
WNote:  
CNote:

CHIP: 850866  
Date: 09/30/2004  
Contact: Telephone  
Success: Yes  
comments: Client called back to inform that she called the Waffle House about a job and that they said they were hiring, but that client will need to take phone survey before completing application for job. Reviewed with client possible survey questions pertaining to job issues. Wished client good luck and to keep CC updated. Client stated that she will call back tomorrow.  
WNote: Follow up with phone survey for possible job.  
CNote: Plans to call Waffle House tomorrow for phone survey for possible job.

Date: 09/30/2004  
Contact: Face to Face - Home  
Success: Yes  
comments: Client came by office to follow up with MU letter that she received. Client informed that she is going to VR in the Work Adjustment program. After talking with client, client informed that she is a CPS client and that her 3 children are in Foster care with family. Counseled with client about priorities of getting children back in home. Client stated that she needs a job. After reviewing client's work history with client, it was observed that client seems to have difficulty keeping a job. Counseled with client about the importance of keeping a job as it relates to advancing and pay increase. Also it was learned that client did take HS Diploma test

with Cornerstone, but did not pass 3 areas on test. Client stated that she could get money to take test again. Encouraged client to follow up with retaking test. Also suggested that client get drivers license since she has had permit for 2 yrs. E explained how this will help her with job since client lost several jobs due to transportation. Client stated that she was interested in pursuing this also. Informed that cc was here to help her. Client became very emotional (crying) because we talked about how her children being removed affects them and her as their mother. Talked about cc working with CPS case manager so to assist client in plan for getting children back. Client stated that it would be fine for cc to talk with CPS case manager. Reviewed again what her new goals are and talked with her being ready to change to make this happen. Client stated that she is ready and plans to follow up with goals; sending money order to get HS diploma test to retake , job search(follow up with leads at Tiger mart) and try for drivers license. After talking with cleint, cc transported client to clothes shelter where she was able to get a lot of clothes for herself that she could wear to work when she gets job. Transported client to several employers to submit applications. Then transported client home. Client gave cc copy of her resume from VR for case record and reviewed with client, her HS diploma scores from Cornerstone. Explained process for client mailing in money order along with form from Cornerstone. Informed for client to keep cc updated. Cleint stated that she will.

WNote: Follow up with goals and plan to talk with clients CPS case manager about clients situation and plans while in MU.

CNote: Plans to job search, follow up with leads, get money order for Test from Cornerstone to retake, try for drivers license when car is out from the shop. Keep cc updated..

Date: 10/01/2004

Contact: Other Contact

Success: No

comments: Called clients CPS case manager to follow up and inform that client is participating in MU and to get info that could possibly help client with goals, but case manager was not in office. Left message asking to call cc back.

WNote: Call back if doesn't return call.

CNote:

Date: 10/01/2004

Contact: Telephone

Success: Yes

comments: Client called cc back today to inform that she passed phone survey with Waffle House and that she is scheduled to come in to complete application for job. Client stated that she has transportation and will keep cc updated. Wishe dclient good luck and encouragled clietn to do her best.

WNote: Follow up with possible job at Waffle House.

CNote: Appt at Waffle House on Monday to complete application for possible job. Keep cc updated.

Date: 10/04/2004

Contact: Telephone

Success: Yes

comments: Client called back to inform that she got the job and has to meet with the District manager on Thursday to pick up shirts. Client stated taht she will need to get black pants and black tennis shoes for job. Informed that MU can pay for uniforms. Client stated that she will be working 3rd shift at \$6.25.per hr. plus tips. Client stated that she doesn't have transportation until she gets her car out from shop. Client stated that it will cost \$227.00 for repair. Informd for cleitn to get bill so that cc can submit to see if MU can pay car repair since client needs car for work. Clietn stated that she will bring it Thursday after meeting. Also informd that cc will take cleitn shopping for pants and shoes for job. Informed that cc will arrange for DSS driver to take to meeting on Thursday and then bring client to office so that cc can take shopping for uniforms and getting car out from shop. Client stated that she will. Congratulated client and reminded her to do her best on job and keeping job as it relates to advancements and her possibly getting her children back from Foster care. Reminded client about the work incentives.

WNote: Follow up with clients new job and arrange transportation with DSS driver for Thursday. Follow up with MU paying for car repair bill so that client can drive to work and purchasing uniforms and shoes for client. Meet with client Thursday at Dillon office.

CNote: Plans to meet with District Manager on Thursday to pick up shirts for job and then come by office for cc to assist with car repairs bill and uniforms for job.

Date: 10/04/2004

Contact: Telephone

Success: Yes

comments: Called client back to inform that DSS driver plans to transport client to job interview at the Waffle House and for her to be ready in 20 mins. Reviewed interviewing techniques ans informed that she needed to dress appropriately for interview. Gave suggestions. Informed for client to give resume at interview and to make sure she had SS card, ID to submit. Wished client good luck and asked for her to call cc back after interview and is home. Client stated that she will.

WNote: Follow up with job interview.

CNote: Job interview at the Waffle House. Call cc back after interview.

Date: 10/04/2004

Contact: Other Contact

Success: Yes

comments: Called FI supervisor at DSS to see if DSS driver can transport client to the Waffle House for interview. FI supervisor stated that she will have to locate driver and will have her transport client. Gave clients address, directions and phone nu,mber. FI supervisor stated that it will be about 20 mins. Informed that cc will call client to be ready for van.

WNote: Call client.

CNote:

Date: 10/04/2004

Contact: Telephone

Success: Yes

comments: Client called to inform that her job interview at the Waffle House is this morning, but does not have transportation. Client stated

that her arrangements fell through with friend. Informed tat cc will call Dillon DSS to see if DSS driver can transport and will call back.  
WNote: Plans are to call DSS to arrangre transportation and call client back.

CNote:

Date: 10/07/2004

Contact: Other Contact

Success: Yes

comments: Visited clients CPS case manager to follow up with clients treatment plan for CPS. Case manager informed that client needs to focus on being stable. Case manager stated that client seems to move a lot from house to house thus causing the children to have to change schools and therefore getting behind in school work. Informed tht client needs to display stablility before the children can be returned. Discussed clients MU plan along with informtng that she did get a job starting on Monday , plans to retake HS diploma test and get drivers license. Informed that cc plans to work closely with client, teaching and mentoring to hopefully teach client the importance of keeping a job as it relates to advancements on job. Informed that cc will also work with client in learning to be stable by not moving around so much so to help provide a stable home for her children. Plans are to counsel with client along the way to hopefully help client in changing her lifestyle. Case manager stated that she will keep cc updated. Informd that cc will keep updated.

WNote: Keep clients CPS case manager updated.

CNote:

Date: 10/07/2004

Contact: Face to Face - Home

Success: Yes

comments: Client came by office after job interview. Client informed that she got the job and starts on 10/11/04 working 3rd shift at \$5.15.per hr. However, client stated that supervisor informed that she could possible move up to \$6.25.per hr. if she could learn to cook also. Client stated that she indicated to supervisor that she would be interested in cooking to move up. Counseled with clietn again about the importance of keeping job as it relates to moving up on job. Client stated that she understood and that she knows in the past, she has had problems with keeping a job, but wants to change. Client also informed that she did get the money for HS diploma test to retake and mailed to Cornerstone. Encouraged client to keep up the good work and to keep cc updated. Client stated that she will. Submitted 1269 and voucher for \$130.00 to get car out from shop after repairs so that she will have own transportation to work. Transported client to Walmart to purchase pants and shoes for new job. Mechanic working on clients car stated that client needs a lot of work done on car. Client stated that her Uncle is a mechanic and could possibly help work on her car. Encouraged client to talk with uncle . Informed that her CPS case manager has not returned call, so cc plans to talk with case manager today to inform about clients job and MU plan. Client stated that che will call cc on Tuesday after her first day on job to give follow up of job. Wished client good luck.

WNote: Follow up with clients new job.

CNote: Plans to start new job on 10/11/04 at the Waffle House, retake HS diploma test with Cornerstone and try for drivers license. Keep cc updated about new job.

Date: 10/07/2004

Contact: Telephone

Success: Yes

comments: Called client to inform that DSS driver will be picking up client to transport to job interview at the Waffle House at 10:00. Client stated that she will be ready. Wished client good luck and that cc will see her after interview.

WNote: Follow up with client after interview to see if she got job for sure and then assist client with paying for car repairs so to have a car to drive to work. Also will need to assist client with work uniforms and shoes for job.

CNote: and job interview at the Waffle House. Plans to come by office after interview.

Date: 10/07/2004

Contact: Other Contact

Success: Yes

comments: Checked with FI supervisor to follow up with DSS driver picking up client for job interview. FI supervisor stated that it has been arranged and is planning to transport client.

WNote: Plans are to call client to inform that DSS driver will pick up and for her to be ready.

CNote:

Date: 10/12/2004

Contact: Telephone

Success: Yes

comments: Client called to inform that her 1st day on the new job went well. Client stated that she enjoyed her work. Client stated that her car was doing okay, but that her dad and uncle were still going to help her with more repairs. Encouraged and informed client that CC was very proud of her and for her to keep up the good work.

WNote: Continue to follow up with new job.

CNote: maintain job (retention), get more car repairs done , waiting to hear back from Cornerstone for HS diploma test. Keep cc updated.

Date: 10/21/2004

Contact: Telephone

Success: Yes

comments: Client called to inform that she completed her training on job yesterday at the Waffle House. Client stated that job was going well and that car was driving good. Client stated that her Uncle is still helping fix up her car. Client stated that she is getting along better with her father and that he has been more supportive. Client stated that she keeps her CPS case manager updated about MU and job. Encouraged client to continue calling her CPS worker to keep her updated so that she can be working towards getting her children back in home. Client stated that she will. Encouraged client to keep up the good work. Client stated that she has not completed HS diploma test from Cornerstone. Informed for her to try and complete by next Thursday and then come by office for cc to mail. Client stated that she will.

WNote: Continue to follow up with CPS case manager for client working towards getting her children back, follow up with job, housing, car and HS diploma test. Meet with client next Thursday to mail test back.  
CNote: Maintain job (retention). Keep CPS case manager and cc updated. Plans to call next Thursday to schedule time to come by office.

Date: 10/25/2004

Contact: Telephone

Success: Yes

comments: Client called to inform that she has completed her training on job and worked on her own today. Client stated that she thought she did a good job. Encouraged client to keep up the good work and to keep cc updated. Client stated that she is still working on her HS diploma test and plans to bring by office on 11.4.04 for cc to mail.

WNote: Continue to follow up with job and HS diploma test.

CNote: Maintain job (retention) and complete HS diploma test and bring by office on 11/4/04 to be mailed. Keep cc updated.

Date: 10/28/2004

Contact: Telephone

Success: Yes

comments: Client called to just check in with cc. Client stated that she had to work last night on her day off because they called her to come in. Reinforced client that she did good by offering to come in when they call her. Informed that this is the way to advance on job. Encouraged client to keep up the good work and keep cc updated. Client stated that she will.

WNote: Follow up with new job.

CNote: maintain job (retention) and work overtime or when called to help with advancement on job. Keep cc updated.

Date: 11/03/2004

Contact: Telephone

Success: Yes

comments: Client called to inform that she was upset because her ex-husband came her house for client to visit with her 6 yr. old son (father of child). She stated that he said that she shouldn't live there in the country because her car may not be reliable since it needs some more repairs. Client stated that he was making her feel bad by saying things that put her down. Client stated that he is wanting her son to stay with him and his family. Reinforced client that she was doing good and that her CPS case manager will make sure that everything will be suitable for the children to return home to her and for her not to worry about what he says. Encouraged client to keep up the good work. Client stated that her father and uncle are still helping with her car. Reminded client that cc will see her tomorrow in Dillon.

WNote: Meet with client tomorrow to take to clothes shelter to get clothes for her children when they are returned.

CNote: maintain job (retention) and meet with cc tomorrow to get clothes from shelter for children.

Date: 11/22/2004

Contact: Telephone

Success: Yes

comments: Client called to follow up with cc. Client informed that job was still going well and that they have reduced her food stamps due to her increase in pay. Client also stated that she is planning to talk with her CPS case manager about possibly getting children back next week. Encouraged client to keep up the good work and to keep cc updated. Client stated that she will.

WNote: Follow up with client's CPS case manager about client possibly getting children back from Foster Care next week. Continue to follow up with job.

CNote: maintain job (retention). Keep cc updated about CPS case and job. Plans to come by office on 12/2/04 to complete HS diploma test and mail.

Date: 11/29/2004

Contact: Telephone

Success: Yes

comments: Client called to follow up. Client stated that job was still going well and that her waitress tips have been increasing. Client also stated that she has been trying to follow up with CPS case manager to report that her son fell at the foster home he is staying at and that she feels case manager needs to see child's face due to it having a long cut from lip to ear and was swollen. Stressed that client needs to inform CPS case manager. Client stated that she plans to call today. Also client stated that she is planning to possibly get children back on Friday, 12/3/04. Counseled with client about the changes that will take place in her life when she gets children back and that she will need to be ready to make the change. Client stated that she will be ready and has already followed up with child care for children when she is working. Also counseled with her again about the importance of positively reinforcing her children so to build their self confidence and reminded again the effects from removing the children from her that her children endure. Client stated that she understood and plans to work on being a good mother. Client stated that she doesn't want the children removed again and plans to do be a better mother to avoid this happening again with her children. Encouraged client to keep up the good work.. Informed that cc plans to call CPS Case manager about client getting children.

WNote: Follow up with client and call CPS case manager about client getting children back.

CNote: Possibly plans to get children back from CPS on 12/3/04. Maintain job (retention). Keep cc updated.

Date: 12/02/2004

Contact: Telephone

Success: Yes

comments: Client called to follow up with her work incentive. Informed that her incentive will be due on 12/9/04. Informed that cc will follow up with incentive at that time. Client stated that job was still going well. Encouraged client to keep up the good work.

WNote: Follow up with job and CPS case. Plans are to talk with client CPS case manager today to follow up with client getting children back.

CNote: Maintain job (retention). Keep cc updated.

Date: 12/03/2004

Contact: Other Contact

Success: Yes

comments: Called clients CPS case manager to get update about clients children returning home to her. CPS case manager informed that it would probably be in January due to them wanting to see if clients work hours will remain the same and not decrease after the holidays so that client can support children.

WNote: Continue to follow up with clients job and her children returning home to her.

CNote:

Date: 12/06/2004

Contact: Telephone

Success: Yes

comments: Client called crying stating that she talked with CPS case manager about children being returned before the holidays. Counseled with client about the possibility that CPS was wanting to wait to assure that her work hours will remain the same after the holidays so that she can support the children. Client was very upset, but after talking with client about her setting up visitation with her oldest son since she is not allowed to visit him at the the home he is staying through DSS, client calmed somewhat. Counseled with client about the importance that she maintain her job and that she let her children know that she loves them and visits them through the holidays even though it hurts her (indicated by client) to say good bye until the next visit. Encouraged client to be strong for her children and to let them know that she loves them. Suggested that client call DSS and talk with her CPS case manager about arranging a visit with her oldest son since she has not been allowed to see home recently due to client calling CPS case manger about client son cutting his face from falling down.

Client stated that she will. Informed for her to keep cc updated.

WNote: Follow up with CPS case and job to assist client.

CNote: Maintain job (retention) and plans to call CPS case manager to have her arrange visitation with her oldest son. Keep cc updated.

Date: 12/08/2004

Contact: Telephone

Success: Yes

comments: Client called to inform that they have increased her working hrs. at the Waffle House. Reninforced and encouraged client to keep up the good work. Talked with cleitn about her talking with CPS case manager about arranging visitations with older son through DSS, but client stated that she plans to call Monday to talk with Ms. L in CPS. Reminded clien that her work incenitve is due tomorrow and for her to call cc in the morning so that cc can submit voucher and 1269 for incentive. Client stated that she will.

WNote: Follow up with client arranging visitations with older son through DSS and follow up with job.

CNote: Plans to talk with CPS case amager on Monday about visitations and call cc tomorrow about incentive.

Date: 12/09/2004

Contact: Telephone

Success: Yes

comments: After reviewing client work incentives, it was observed that clients 9 mo. incentive is due 12/18/04 and not 12/9/04. CC called client to inform and client stated that she understood.

WNote: Continue to follow up.

CNote: Maintain job (retention). Keep cc updated.

Date: 12/16/2004

Contact: Telephone

Success: Yes

comments: Called cleitn to inform that her 9 mo. incentive will be due on 12/18/04 and that client will need to come by office on 12/20/04 after cc verifies that client is still working to pick up incentive. Cleint stated dthat she will. Client stated that job was still going well. Also client stated that she still has not been able to set up visitation with older son. CC suggested that client talk with CPS Supervisor to ask what are her legal rights in visiting with her child so that they can assist client with this matter. Client stated that when she calls her older son, they will not let her talk with him. Encouraged client to talk with CPS supervisor to get info about talking and visiting with her older son. Client stated that she will and will keep cc updated.

WNote: Follow up with job and her talking with CPS supervisor about visiting rights.

CNote: Plans to call CPS supervisor about arranging visitation with older son and talking to him on the phone. Keep cc updated.

Date: 12/20/2004

Contact: Telephone

Success: Yes

comments: Called client back about cc calling the Waffle House to confirm that she is still working for her to recieve incentive. Counseled with client about her missing too many days at work and explained to her about the importance of having good work habits as it relates to keeping and advancing on job. Client stated that she plans to to do better. Infoemd that cc contacted DSS about processing her 9 mo. incentive and that she will need to call DSS office later today or tomorrow to arrange to pick up incentive. Client stated that she will and will keep cc updated.

WNote: Follow up with client improving her attendance record at work.

CNote: Plans to improve attendance at job. Pick up incentive and keep cc updated.

Date: 12/20/2004

Contact: Other Contact

Success: Yes

comments: Called Dillon DSS and talked with FI supervisor to inform to process clients voucher and 1269 for cleint to recieve her 9 mo. incentive.

WNote:

CNote:

Date: 12/20/2004

Contact: Other Contact

Success: Yes

comments: Called the Waffle House to confirm that client is still working . Talked with cleitns supervisor whom informed that client si still working, but has been missing too many days of work Informed that cc plans to talk with client about this problem. However, supervisor did stated that client is a good worker..

Verified that she is still

employed;

Date: 01/04/2005

Contact: Other Contact

Success: Yes

comments: Verified w/ Jim - Manager, that she is still employed;

WNote: Since I was unable to get her, send letter asking to respond;

CNote:

Date: 01/04/2005

Contact: Telephone

Success: Yes

comments: Phoned today and, only able to leave a message; The phone listed has been disconnected

WNote: Call Waffle House

CNote:

Date: 01/19/2005

Contact: Telephone

Success: Yes

comments: Client called to inform that her job at the Waffle House was still going well, but that she has just obtained another parttime job that will increase her income. Client stated that she is working 20 hrs. with Boatwright Construction per week cleaning at \$5.15 per hr. Encouraged client to keep up the good work and that she needs to inform her CPS case manager. Client stated hat she will. Informed for client to keep cc updated. Client stated that her CPS case manager indicated that she may be getting her children back home in March if she proves to be stable with job and home. Encouraged client to keep jobs and do not move from home.

WNote: Follow up with jobs monthly.

CNote: maintain jobs (retention) and keep cc updated.

Date: 01/25/2005

Contact: Other Contact

Success: Yes

comments: Called clients new parttime job at Boatwright Cobstruction to verify that client is working. Talked with manager who confirmed that client is working parttime. Manager stated that client was working out very well. Explained MU program and asked if cc can call to follow up with clients progress. Manager stated that he would be glad to assist MU.

WNote: Notify clients CPS Case Manager that client is also working parttime along with working at the waffle House.

CNote:



