DELIVERING QUALITY REMOTE SERVICES RESOURCE PACKET

A Toolkit for Case Managers and English Language Learner Navigators

ELL Co-Enrollment Pilot Project
Technical Assistance Team

Resource Packet Overview

The onset of the COVID-19 pandemic across the United States in early 2020 has led to dramatic economic upheaval and major changes to the way individuals live their daily lives. In California, by the end of April of 2020, the unemployment rate had risen to above 16% and is predicted to remain in the double digits for the rest of the year. As the state has begun to adapt in response to the COVID-19 impact, many businesses remain closed or only partially opened and residents are being encouraged to stay home and avoid gatherings. Strict guidelines for social distancing remain in place throughout the state with all residents having been advised to remain at least 6 feet away from all non-household members at all times and required to wear face masks and other PPE in order to enter most public and private facilities.

The changes have also impacted the way case managers and English Language Learner (ELL) navigators are able to interact with and support their clients. In most parts of the state, nearly all client communication has shifted to remote formats. ELL navigators are supporting clients with training and case management services through online platforms and tools as well as through other creative means of mailing or delivering printed material as needed. Clients are also facing unprecedented economic hardship with ELLs and other immigrant populations being disproportionally impacted by the rapid downturn in the economy. Under these conditions, navigators must find ways to build and maintain trust with their clients, provide much needed services, and support their clients' overall economic wellbeing.

This toolkit for case managers and ELL navigators provides resources and guidance on how to connect remotely with clients of varying digital literacy levels, building clients' trust remotely, coaching clients on working in frontline positions during the pandemic, and how to make challenging financial decisions during a time of economic hardship. Each tool is intended to support ELL navigators both in how to connect with clients during the COVID-19 response period and the content that will be most helpful for clients at this time. As ELL navigators look to support and engage their clients around training and job needs, they can select the specific tools from this resource guide that are best suited to each of their client's unique needs. The following Table of Contents includes links to each resource in the packet.

Table of Contents

Platforms and Tools for Engaging Clients Remotely

This document contains resources intended to guide strategy for engaging ELL Co-Enrollment clients during the COVID-19 crisis. It outlines platforms and tools case managers and navigators can use to engage with clients remotely based on a client's level of digital access and digital literacy.

Contents

I. Introduction

This document contains resources intended to guide strategy for engaging ELL Co-Enrollment clients during the COVID-19 crisis. The COVID-19 crisis resulted in California implementing “safer at home” orders beginning in March 2020 and these orders have significantly impacted workforce service delivery activities across the state with nearly all services moving to an entirely or primarily remote service delivery model. While California has begun to take steps toward phased re-opening of non-essential businesses and activities, it is anticipated that the need for ongoing social distancing in communities and workplaces will continue for months ahead and, likely, until vaccine(s) or effective treatment is widely available. It is especially important for ELL Co-Enrollment project teams to think critically about the platforms and tools they are selecting to enable remote service delivery given the digital literacy and language barriers of the target population.[1]

This resource is designed to:

1) Present a framework for thinking about what tools and platforms should be integrated into remote service delivery for ELL Co-Enrollment teams;
2) Provide information on platforms and tools that can be used to facilitate remote service delivery. This information is presented in a manner that can help teams select the platform or tool that is best suited to the project activities they are trying to complete and the digital skill level of the client(s) they are serving;
3) Provide information on best practices in using digital platforms and tools to provide remote services to the target population.

It is intended for use among all ELL Co-Enrollment project partners, including direct service staff and management.

[1] In the Survey of Adult Skills, conducted under the auspices of the Organization for Economic Cooperation and Development (also known as the Program for the International Assessment of Adult Competencies, or PIAAC) is administered by National Center for Education Statistics of the Institute for Education Sciences at the U.S. Department of Education, while immigrants made up 15% of the respondents, they comprised 38% of those that fell into the “no digital skills” category and 23% of those that feel into the “limited digital skills” category.

II. A Framework for Selecting Digital Platforms and Tools to Support Remote Service Delivery

The five-pillar framework below can help form the basis of project team conversations about the choice(s) the team makes in selecting specific digital tools and platforms to support remote service delivery.

Framework Pillar	Why it is Important
Digital literacy and language needs of clients	ELLs have lower levels of digital literacy than native-born Americans and language barriers can add additional challenges with interpretation so it is critical that client-centered choices are made
Specific tasks and activities will require different platforms and tools	Making decisions based on both the specific tasks and activities that need to be completed, as well as on the goal of the broader project - helps avoid the pitfalls of one-size-fits all decision-making
Partner and project team infrastructure	Decisions on digital platforms and tools that are aligned with the hardware and software infrastructure of partners will be easier to implement and sustain
Flexibility and responsiveness	Teams are operating in a dynamic environment and being able to respond to social distance policy changes, the specific digital skills and resources of the target population over time, the skill(s) of project staff, and more are all critical in crafting a durable, responsive plan
Safe and secure	Teams must continue to uphold all necessary standards regarding PII and the sharing and storing of sensitive information

As ELL Co-Enrollment Project teams use the framework above to discuss the choice(s) they are making about using specific digital platforms and tools to engage clients with remote services, the following additional guidance is provided:

- **When possible give clients the opportunity to choose the medium of communication that they prefer**. Although some platforms appear operationally similar, for clients building foundational digital literacy skills, adapting their skills/knowledge to even a slightly different interface can be difficult. Use initial check-ins with clients to engage them on which digital platforms they feel comfortable using.

- **Clients may be using tools or platforms in other areas of their life right now** – ask them about this and follow their lead when possible.

- **Coordinate client communication across partners** in order to minimize the number of tools and platforms teams are expecting clients to use.

- It is **inherently difficult to remotely engage clients who have low digital literacy skills**. With any platform, there will be a barrier to entry and for teaching digital literacy, nothing can replace one-on-one instruction to help users become more comfortable. Refer to section IV of this resource guide, “Best Practices in Using Digital Platforms and Tools in Serving Clients Remotely,” for additional strategies on engaging clients with low digital literacy skills.

- **Consider the level of digital access of a client** and tailor services appropriately. A client may have a computer and internet in the home but shares those resources with other family members. They may also have a computer but not internet access and need guidance on how and where to access internet services.

- **Think about information security in particular at the level of the task or activity**. This approach allows maximum latitude in using some easier-to-use options for general communications, while ensuring that proper security measures are in place when it comes to exchanging specific types of PII or sensitive information.

- In general, **if the level of security of a specific tool or platform is not known, refrain from using it to share/send sensitive information**. Check with your organization's IT team on the safety and security of a platform or tool prior to use.

- Make sure that all project partners understand the **resource cost of the choices** being made.

- Make sure all choices are **allowable by organizational-level and funder-level guidelines** of project partners.

As case managers and navigators consider the level of digital literacy of their clients they should also take into account each client's level of digital access. Digital access includes both access to a computer, iPad, smartphone or other internet capable device along with a reliable internet connection. While many clients may be digitally literate, they may not have access to the tools needed to reliably connect remotely with their navigator. If digital access is a challenge for clients, consider working with your program manager to shift ELL Co-Enrollment grant funding to provide clients with supportive services in the technology space. Certain internet service providers have programs for eligible low-income individuals to access unique low and free of cost internet plans. Consider connecting with these programs in your area to support ELL clients in need of greater digital access.

III. Selecting Platforms and Tools

This section is organized around types of remote service delivery including: one-on-one case management services, group coaching and instruction, and self-guided skill development.

It is not meant to include a comprehensive list of all tools or platforms or tools but rather, a compilation of some of the more common and accessible platforms and tools with an emphasis on those that are familiar to large numbers of people and are low-cost or free. *This resource guide is not intended to officially endorse any particular platform or tool but rather to provide options for consideration*.

Finally, many of the tutorials listed in this section rely on being able to turn on subtitles on in YouTube, which can frequently be automatically translated to a wide variety of languages (imperfectly). It is recommended that staff engage in short one-on-one targeted assistance to help clients access this specific function on YouTube to increase a client's ability to benefit from these types of YouTube tutorials. See this tutorial on for instruction on how to turn on YouTube subtitles in over 60 different languages.

III.A One-on-One Case Management Services

Tasks that ELL Co-Enrollment project staff might need to complete as a part of one-one-one case management services include:

- Check-in and establishing a new way of working together;
- Assessment of current needs;
- Referrals;
- Verbal conversations and coaching;
- Helping clients decipher new information they are receiving from education and training programs, employers, public benefits, or co-enrollment partners;
- Capturing information that supports documentation of outcomes.

It should be noted that while basic phone calls via both smart phone and flip phone are often the simplest approach for clients with low digital literacy levels, there may be significant benefits from trying to use one of the platforms or tools below instead of a phone call. Specifically, these platforms and tools may provide the additional benefit of screen sharing, options to send a single message to an entire caseload, and importantly, offer protections to project staff who may not have access to employer-provided cell phones and are concerned about their privacy in working from home using their personal devices.

<table>
<tr><th colspan="2">Platform/App: Google Voice</th></tr>
<tr><td colspan="2"><u>What this tool could be used for:</u> Providing phone and text based case management services to clients</td></tr>
<tr><td><u>Pros:</u>
- Ability to initiate and receive calls and texts to and from any phone number
- Flexibility to conduct calls through Google Hangouts on a computer over WiFi
- Opportunity to preserve a work phone number separate from a personal phone for project staff that may not have a work cell phone</td><td><u>Drawbacks:</u>
- Can be time consuming and clunky in practice compared to a regular phone call
- Limited ability to send mass or group text messages</td></tr>
<tr><td colspan="2"><u>Digital Literacy Challenges for Clients</u>
- A client must be comfortable answering a phone call from a number they may not recognize</td></tr>
<tr><td colspan="2"><u>Tutorials and Resources</u>
- Features of Google Voice
- Set-Up</td></tr>
</table>

<table>
<tr><th colspan="2">Platform/App: WhatsApp</th></tr>
<tr><td colspan="2"><u>What could this tool be used for:</u> Providing phone, text, and video call case management services to clients</td></tr>
<tr><td><u>Pros:</u>
- Simple and adaptable platform for sharing videos, links, or other coaching materials as well as making voice and video calls
- Ability to set up groups of any size through which to share information and foster discussion among clients</td><td><u>Drawbacks:</u>
- WhatsApp must be set up through a number that can receive a text message verification code, typically a cell phone. For those that do not have a work cell phone, this can make it difficult to keep your personal number private from clients.</td></tr>
<tr><td colspan="2"><u>Digital Literacy Challenges for Clients:</u>
- For some individuals, the typing aspect of WhatsApp may be difficult while the voice and video calling functionality may be easier</td></tr>
<tr><td colspan="2"><u>Tutorials and Resources</u>
- Quick tutorial (iPhone)
- Longer tutorial
- Setting up WhatsApp</td></tr>
</table>

<table>
<tr><th colspan="2">Platform/App: Facetime</th></tr>
<tr><td colspan="2"><u>What could this tool be used for:</u> Case management services in a video call format</td></tr>
<tr><td><u>Pros:</u>
- Simple functionality similar to that of initiating and receiving voice phone calls
- "Face to face" video calls more closely mimic meeting in person and can support building and maintaining trust with clients during social distancing
- New Apple products allow for group facetime calls as well as 1:1 calls</td><td><u>Drawbacks:</u>
- Only available with Apple products</td></tr>
<tr><td colspan="2"><u>Digital Literacy Challenges for Clients:</u>
- A client must understand how to answer a phone call and how to hold the phone in a manner that allows them to view the phone's screen and camera</td></tr>
<tr><td colspan="2"><u>Tutorials and Resources:</u>
- How to set up Facetime
- How to Use Facetime
- FaceTime in Groups</td></tr>
</table>

<table>
<tr><th colspan="2">Platform/App: Facebook Messenger</th></tr>
<tr><td colspan="2">What could this tool be used for: Providing phone, text, and video call case management services to clients</td></tr>
<tr><td>Pros:
- Simple and adaptable platform for sharing videos, links, or other coaching materials as well as making voice and video calls
- Ability to set up groups of any size through which to share information and foster discussion among clients
- Utilizes a widely used platform many clients may already be familiar with</td><td>Drawbacks:
- Potential difficulty in maintaining clear lines between work and personal communication channels for both staff and clients</td></tr>
<tr><td colspan="2">Digital Literacy Challenges for Clients:
- Some users may be familiar with using the Facebook Messenger app on their phone but unable to access it easily on a computer</td></tr>
<tr><td colspan="2">Tutorials and Resources:
- Basic Tutorial</td></tr>
</table>

<table>
<tr><th colspan="2">Platform/App: Google Calendar</th></tr>
<tr><td colspan="2">What could this tool be used for: Organizing coaching sessions and classes with clients</td></tr>
<tr><td>Pros:
- Ability for clients and Navigators to more simply coordinate meetings and trainings simultaneously with multiple parties
- The calendar tool can be set to send a reminder to clients at a pre-determined interval before a scheduled event</td><td>Drawbacks:
- May not be a convenient tool for clients if they are not already in the habit of using an online calendar
- Requires clients to have an email account</td></tr>
<tr><td colspan="2">Digital Literacy Challenges for Clients
- Understanding the difference between accessing an event on a computer or phone. Clients may receive an invite on one device and not know how to access it on another.
- Understanding the calendar in such a way as to identify and respond to event conflicts</td></tr>
<tr><td colspan="2">Tutorials and Resources
- Adding a Calendar Event in Android
- Guide to Calendar with a focus on start/setup
- Google Calendar for mobile advanced tutorial
- Creating Events in Calendar
- Responding to Calendar Events</td></tr>
</table>

<table>
<tr><th colspan="2">Platform/App: Remind App</th></tr>
<tr><td colspan="2"><u>What could this tool be used for:</u> Individual and group case management and file sharing</td></tr>
<tr><td><u>Pros:</u>
- Ability to translate messages into over 90 different languages all within the app
- Connects with materials on Google Drive, Microsoft OneDrive, Box, Google Classroom and other online cloud based storage tools
- Allows for two-way messages and discussion both 1:1 and in multiple groups simultaneously
- Messages can be sent live or scheduled in the future</td><td><u>Drawbacks:</u>
- Some functions are only accessible when all clients have downloaded and are using the Remind app</td></tr>
<tr><td colspan="2"><u>Digital Literacy Challenges for Clients</u>
- Clients must be comfortable reading and responding to text messages on a phone OR downloading the Remind app to their computer and creating a login</td></tr>
<tr><td colspan="2"><u>Tutorials and Resources</u>
- Basic Tutorial
- Leveraging Remind for Group Instruction
- Additional Resources</td></tr>
</table>

<table>
<tr><th colspan="2">Platform/App: Google Translate App</th></tr>
<tr><td colspan="2"><u>What could this tool be used for:</u> Case management translation support</td></tr>
<tr><td><u>Pros:</u>
- Provides real-time text translation between 109 different languages and real-time voice translation between 37 different languages
- Can be used on a cell phone app or on a computer
- Ability to translate via a phone’s camera tool, handwritten words, a live conversation, and voice recordings</td><td><u>Drawbacks:</u>
- The live conversation tool works best when two individuals are close in proximity and can both speak clearly into the app. When this is not possible, creative workarounds must be used.</td></tr>
<tr><td colspan="2"><u>Digital Literacy Challenges for Clients</u>
- The Google Translate tool may not always provide grammatically perfect translations, requiring patience and flexibility on the part of the client and staff member
- While the Google Translate app provides text, audio, and image based translations, these messages must be sent and opened by the client through either a texting, voice or video based platform. The client must be comfortable using the selected platform in order to receive the translated messages.</td></tr>
<tr><td colspan="2"><u>Tutorials and Resources</u>
- Google Translate App for Phones
- Google Translate on a Computer</td></tr>
</table>

As part of on-on-one case management in a remote environment, it can sometimes be helpful to have screen share capabilities either from client to staff or staff to client. ELL Co-Enrollment Project Teams might especially want screen share functionality to:

- Help clients read or understand information they have received from work, benefits, or education programming they are engaged in;
- Show a client a particular website, resource, or other document so they can walk through specific next tasks that a client may need to complete (e.g. create a log-in for an online learning system);
- Review documentation that supports recording outcomes.

While several of the resources mentioned in this guide have screen share functionality, the following option may be somewhat simpler and generally allow clients to screen share through simply clicking a link in a text message.

<table>
<tr><th colspan="2">Platform/App: Screen Leap</th></tr>
<tr><td colspan="2"><u>What could this tool be used for:</u> Screen share functionality to support case management</td></tr>
<tr><td><u>Pros:</u>
- The ability to “show” a client something on your screen while you talk through it including providing a visual example of a specific document, login or process
- Allows visual sharing without needing to send and receive documents via email, text message or other format</td><td><u>Drawbacks:</u>
- Security features are for viewing of normal information and not specifically tailored to sensitive information or PII</td></tr>
<tr><td colspan="2"><u>Digital Literacy Challenges for Clients:</u>
- Requires the user to be able to click on a link in a text message and conceptually understand that they are either looking at another person’s screen or another person is looking at their screen</td></tr>
<tr><td colspan="2"><u>Tutorials and Resources:</u>
- Basic Tutorial</td></tr>
</table>

III.B Group Coaching or Instruction[2]

Tasks that ELL Co-Enrollment project staff might need to complete as a part of group coaching or instruction include:

- Providing coaching or support to a group of clients that are in a cohort-based program;
- Supporting the development of specific skills such as resume development or interview skills;
- Providing opportunities to hear from partner(s), guest speakers, and others in a group environment

[2] It should be noted that the resources being presented for group coaching and instruction are primarily targeting an audience outside of traditional adult school providers. Adult schools – with their focused purpose of instruction and dedicated infrastructure and staff expertise around instruction – are typically going to have significantly more options in considering how to provide learning remotely. The information in this section will likely be most useful for organizations (e.g. CBOs, career center staff) that are providing some type of group engagement or skill building and do not currently have a robust, existing infrastructure in place for online learning.

It is strongly recommended that project staff support account set-up and check that clients can log in and access these platforms in advance of any scheduled group coaching or instruction activity to avoid challenges at the time of the session.

<table>
<tr><th colspan="2">Platform/App: Skype</th></tr>
<tr><td colspan="2"><u>What could this tool be used for:</u> Video based case management, group meetings, and file sharing</td></tr>
<tr><td><u>Pros:</u>
- Supports large groups of people connecting at once
- Allows the sharing of messages and files during video calls
- Can be accessed both from a computer through the web and via a phone based app</td><td><u>Drawbacks:</u>
- The system is not particularly intuitive for clients with a low level of digital literacy
- Registration and login includes a multi-step process that requires an email address
- Does not allow the host to mute and unmute call clients</td></tr>
<tr><td colspan="2"><u>Digital Literacy Challenges for Clients:</u>
- Downloading Skype onto a computer or telephone requires several different steps and requires the individual to have an email address
- Creating an account prompts the user to enter credit card information (though there is no fee when calling between two Skype contacts)
- Using audio and video devices simultaneously can sometimes be difficult for those new to the platform</td></tr>
<tr><td colspan="2"><u>Tutorials and Resources:</u>
- Quick tutorial
- Setting up Skype meetings
- Longer tutorial just visuals
- Skype Accessibility Features for ELLs with Disabilities</td></tr>
</table>

<table>
<tr><th colspan="2">Platform/App: Zoom</th></tr>
<tr><td colspan="2"><u>What could this tool be used for:</u> Group meetings and trainings</td></tr>
<tr><td><u>Pros:</u>
- Ability to record and easily share training sessions for later viewing
- Can be used on desktops, laptops, mobile devices
- Functionality to screen share, conduct polls, organize in-call breakout rooms, and have clients annotate the screen
- One-way cloud based interpretation feature</td><td><u>Drawbacks:</u>
- With a program like Zoom, there will be a high barrier for clients to access it for the first time without foundational digital literacy skills
- Free version is restricted by time and number of clients
- Interpretation feature is one-way in that it only translates the presenter’s speech to the audience and not audience questions or feedback back to the presenter</td></tr>
<tr><td colspan="2"><u>Digital Literacy Challenges for Clients:</u>
- Although clients do not need a Zoom account to get from an invitation in their email to the actual meeting, they will have to access several menus and buttons that are not intuitive and can be difficult
- Users must connect their computer or phone’s audio and video components to the Zoom call. This sometimes requires a user granting permission for Zoom to access their devices audio and visual equipment.
- Once on a Zoom call, it can be difficult to navigate between the main screen, the mute and unmute buttons, the chat, and any other features being used.</td></tr>
<tr><td colspan="2"><u>Tutorials and Resources:</u>
- Supportive resources developed for COVID-19 pandemic
- How to teach an online lesson with Zoom</td></tr>
</table>

- More in-depth
- Joining a Zoom meeting
- Resources for Zoom accessibility for ELLs with disabilities

Platform/App: Google Hangouts	
What could this tool be used for: Video based case management, group meetings, and file sharing	
Pros: - May be more intuitive for those who are already familiar with using other Google based tools - Sessions can be recorded for later viewing	Drawbacks: - Viewing a recorded session requires additional navigation and digital literacy skills
Digital Literacy Challenges for Clients: - Although joining a Google Hangout without having an email account it possible, it requires additional steps and digital literacy skills - Users with an existing email account will have a much simpler time accessing a Google Hangout. However, they will still need to be able to access their email account, open the invitation email and click on the link to enter the Hangout	
Tutorials and Resources: - Basic Tutorial - Hangouts Meet Mobile Tutorial - Setup Google Hangouts - Google Hangouts Accessibility Features for ELLs with Disabilities	

Platform/App: Microsoft Teams	
What could this tool be used for: Group Meetings and Trainings	
Pros: - Easily integrates chat features, audio and video calls, and file sharing on a single user interface - Allows for simultaneous group and 1:1 communication - More intuitive for existing Microsoft Office users	Drawbacks: - The app is still relatively new and there are small ongoing functionality issues as improvements continue to be made by Microsoft.
Digital Literacy Challenges for Clients: - Receiving an invite for a Teams meeting requires the user to have an email address - Clicking the link to enter the Teams call from an email is not intuitive and requires the user to know where to look for the link - Using Teams can be simplified by using the Teams app however this requires an understanding of how to download the app to either a phone or computer device	
Tutorials and Resources: - Inviting Guests to Microsoft Teams and Accepting Invitations - Inviting Guests to a Meeting - Joining a Meeting as an External Guest - Teams Meetings - Teams Accessibility Features for ELLs with Disabilities	

III.C Self-Guided Skill Building[3]

Tasks that ELL Co-Enrollment project staff might want clients to complete as self-guided skill building include:

- Learning specific tasks such as developing a resume or learning critical workplace health and safety standards in the COVID-19 context;
- Practice foundational skills, including English.

In general, self-guided skill building options are best suited for individuals that have at least intermediate digital literacy and English language skills and will often prove frustrating for those that do not. In cases where it is critical that clients master certain information or skills, it is highly recommended that some type of staff-involved skills check or assessment is incorporated as a part of service delivery.

<table>
<tr><th colspan="2">Platform/App: Canvas</th></tr>
<tr><td colspan="2"><u>What could this tool be used for:</u> Classroom-like online guided learning</td></tr>
<tr><td><u>Pro:</u>
- Canvas has extensive functionality to build out online learning specifically adapted to a particular client population and needs
- Provides the functionality to build out an entire learning curriculum online using posts, presentations, discussions boards, activities, and learning modules.
- Can be accessed on mobile devices or via a computer</td><td><u>Drawbacks:</u>
- The free version of Canvas is capped at 500MB of material uploads
- Canvas has extensive features and functionality that require an investment of time to sort through and build out for each class
- Requires strong digital literacy for clients to interact with the course and use many of the Canvas features</td></tr>
<tr><td colspan="2"><u>Digital Literacy Challenges for Clients:</u>
- Creating an account and differentiating between Canvas for Student and for Teacher
- Navigating the course menu is usually only intuitive for someone who has experience with similar menus and is comfortable searching for files or links in a browser
- More advanced functionality like assignments and discussions would present additional digital literacy challenges</td></tr>
<tr><td colspan="2">Tutorials and Resources:
- Tutorials from Canvas about setting up your course
- Tutorial videos from Canvas about getting started as a student
    o Specific video about the Canvas Student App
- Additional video guides from Canvas
- Another Student Orientation Video (Clients will have to ignore the first few seconds because they are specific to the college producing the video)
- One more Student Orientation Option</td></tr>
</table>

[3] It should be noted that the resources being presented for self-guided skill building are primarily targeting an audience outside of traditional adult school providers. Adult schools – with their focused purpose of instruction and dedicated infrastructure and staff expertise around instruction – are typically going to have significantly more options in considering how to provide self-guided learning remotely. The information in this section will likely be most useful for organizations (e.g. CBOs, career center staff) that are providing some type of group engagement or skill building and do not currently have a robust, existing infrastructure in place for online learning.

IV. Best Practices in Using Digital Platforms and Tools in Serving Clients Remotely

The following best practices will be helpful in ensuring that the target population of the ELL Co-Enrollment project teams are able to access and benefit from remote service delivery.

- **Text messaging** is a strong tool to simply check in with clients and is frequently familiar to even those with very low levels of digital literacy.
- **Text message platforms that have broadcast capabilities** that protect individual client phone numbers can be an effective way to quickly conduct outreach, update an entire caseload on new information, and more.
- Some text messaging platforms allow the creation of sub-groups which can be helpful for creating **language-specific text groups.**
- **Screen sharing is powerful.** It can be used to walk through a presentation with clients, show them examples of documents during a conversation, and open the door to broader visual reinforcement of information you wish to convey. There are options for simpler screen sharing outside of a "full feature" platform such as Zoom and these may be easier for clients with lower levels of digital literacy.
- **Keep remote engagement with clients to a reasonable length of time**, recognizing that this is a different environment than talking to someone one-on-one and clients have a lot of new pressures in their home right now.
- Consider strengthening clients' ability to use digital platforms and tools **by building in regular opportunities to practice** – this will help them feel more confident in accessing both your services and others in this time of social distancing.
- Make sure you **understand specifically what the client will have to do to access a specific tool or platform**. In general, clients with lower levels of digital literacy will have an easier time with tools or platforms that do not require them to set up an account, download new programs or apps, etc. and instead are accessible through a basic link sent by text message.
- If a platform or tool requires registering or downloading an app in advance, **consider calling clients individually 1-2 days in advance before having them participate in a group call to walk them through the process of registering and getting set up**; this will give everyone time to complete this task and you can troubleshoot challenges without worrying about a class that is about to start.
- If working with a group of clients together, **consider having a co-host on your platform** (e.g. Zoom) so one person can lead on providing the content/engagement and another staff member can troubleshoot technical issues among clients.

- Remember that the **platforms and tools used for communicating information or building skills do not have to be the same for assessing that the information has been learned or that skills have been mastered**. Consider staff-involved, live assessment of learning and skills (e.g. a follow-up phone call) after clients have participated in a more self-guided activity.

- **Coordinate across programs and partners** to minimize the number of tools and platforms clients need to learn and use.

- **When using an interpreter, ensure in advance that they are familiar with and know how to use the platform you are selecting** for a specific interaction with a client. Consider having a call with your interpretation resource provider in advance to strategize about how you will work together.

Additional Resources on Using Digital Tools for Remote Service Delivery

- HHS Guidance on Virtual Case Management Considerations and Resources for Human Service Programs
- National Skills Coalition blog post on digital literacy challenges illuminated by COVID-19
- Hanover Research report "Expert Interviews: Developing Online Programming" provides guidance and considerations for building online learning programs
- Language Access in Times of Crises: Getting Started with Video Remote Interpretation by Switchboard

Building Trust and Rapport Virtually: Best Practices and Strategies for Case Management Success

One of the most important components of successful case management is the ability of the case manager or navigator to build and maintain a trusting relationship with their clients. As case managers and navigators continue their work in an environment tailored to COVID-19 response guidelines, including social distancing, they must also tailor and adapt the way they build that trust. This resource provides guidance on approaches direct service staff can take to build trust with clients in COVID-19 response adapted settings.

Introduction

Many ELL navigators and case managers have shared that due to social distancing guidelines in their areas they are either unable to meet with clients or able meet with them only when one-on-one at a distance, while both parties are wearing face masks and other personal protective equipment (PPE). As COVID-19 response guidelines continue to adapt and some offices and workspaces begin to open, meeting with clients in these settings is being adapted, with clients and case managers likely to find themselves meeting in specially designed cubicle spaces or "pods" that separate each side from one another with Plexiglas. Clients and staff will also likely be wearing face masks and other PPE in order to maintain the health of all involved. This new reality has caused challenges for navigators in gaining the level of client trust needed to conduct work successfully.

This resource pulls together and highlights best practices in client relationship building through remote case management when engaging with clients separated by a barrier and wearing PPE, both factors which make it harder to rely on traditional strategies to build rapport and trust. The first portion of this guide provides a formula for case management conversations that help staff acknowledge the challenges of working with clients either remotely or across a physical barrier. The second portion of the guide highlights best practices for building trust with clients in an atmosphere adapted to COVID-19 response guidelines. These best practices come from both within and outside of the ELL Co-Enrollment grantee group.

Components of Trust Building Case Management Conversations

Building trust and rapport with clients virtually requires intentionality and planning, particularly around initial conversations with new clients as well as with existing clients connecting with their case manager for the first time in a new COVID-19 adapted environment. Case managers and navigators can take steps to frame these conversations with clients in a way that prepares the client for what to expect, acknowledges the challenges and awkwardness of socially distanced physical meeting spaces, and demonstrates to the client that the case manager is understanding of awkwardness or discomfort the client may feel. Each step ultimately serves to build trust between the client and case manager.

When preparing to engage with a client, the case manager will want to consider two critical moments for trust building: the "pre-meeting" conversation and the first few moments of the actual case management meeting. Both of these components are applicable and adaptable to meetings taking place in person and virtually over the phone or other tech platforms.

The Pre-Meeting Conversation between the case manager or navigator and client takes place prior to an actual case management session. It typically occurs over the phone or via text message or email. In the past, this engagement has been used to schedule an in-person meeting or prepare a client for particular documents they need to bring their case manager. In today's COVID-19 adapted environment, this conversation is a central moment to building the foundation of trust with a client and should include the following components –

Provide Anticipatory Guidance + Validate Strangeness + Answer Questions

These three components work together to build trust with the client by preparing them for what to expect. It also demonstrates to the client that their case manager understands any strangeness the client may feel connecting in this new way and wishes to support them through that. Details on each conversational component are outlined below -

- **Anticipatory guidance**: Describe what the upcoming encounter will look like in terms of a socially distanced space either inside or outside of the office. Include details on any PPE the case manager will be wearing. Be as specific as possible so that the client has a complete understanding of what to expect in the new environment they are planning to enter. When planning for a virtual meeting over the phone or technology platform, use this time to ensure the client has the digital access and digital literacy skills to connect appropriately. Similarly, describe what the client will see and hear and what the overall session will look like.

- **Validate the strangeness**: Acknowledge to the client that this new environment is not ideal and may at first feel uncomfortable, awkward or weird compared to what they are used to. Case managers can share that this adapted environment is not ideal for them either but that in these uncertain times it is better to meet or connect following social distance guidelines or through a technology platform than not at all.

- **Invite and answer questions:** Case managers and navigators are encouraged to invite and answer any client questions about how the meeting in the adapted space may look, how the client should prepare, or the purpose for maintaining social distance or connecting remotely. Be open and honest with the client and provide information clearly and directly.

The first few moments of the case management meeting provide the second central opportunity for building trust and rapport with a client. This meeting may take place over the phone or another technology platform, in person in the community while maintaining appropriate physical distance, or in an adapted workspace that separates the client and case manager with a Plexiglas barrier. Building on the pre-meeting conversation, the case manager should use this moment to provide additional framing to the context of the meeting in order to continue to lay a foundation of trust with their client. This framing, to take place at the very beginning of the case management meeting, should include the following components -

Photo Based Introduction + Acknowledge the Awkwardness + Focus on the Purpose + Share a Story

Pre-loading a case management conversation with these components works to lay a foundation of connection between the client and case manager and outlines a framework for further trust building. It also demonstrates to the client that their case manager has thought through any challenges or discomfort the client may encounter engaging in a new adapted format and wishes to support the client through it. Case managers should consider touching on each of these components prior to diving into the content of the case management meeting. Details on each conversational component are outlined below -

- **Introduce yourself with a photo**: Using a large printed photo or form of photo ID, the case manager is encouraged to introduce themselves and share an un-masked photo of their face with their client. If communicating with your client over the phone or virtually using another platform, consider sharing a photo in advance of or during the call via text message or other appropriate platform. This will build trust by helping clients to have a clearer picture of who they are speaking with, in particular when most interactions currently involve the wearing of masks and other PPE.

- **Acknowledge the awkwardness**: Share with your client again that you understand that connecting virtually or at a distance is tough. Explain that it's not what you would want in an ideal world but that it's better than not connecting at all. This validation demonstrates empathy and understanding.

- **Focus on the purpose of the engagement:** Acknowledge that despite the discomfort meeting or connecting in this fashion, it is important. Highlight the value that you plan to bring to this connection with the client. Remind them of what your meeting will focus on and how this will support them. Even though this meeting may be tough or strange, it has value because of the services you plan to provide.

- **Share a connecting story:** Sharing a brief story that connects the case manager or navigator to the community the client is from or an experience the client may have had can be a strong building block of trust. While in the past the navigator may have be able to demonstrate this connection by actually meeting with the client in their community, they can create a similar effect by sharing a brief story that highlights this personal connection or commonality.

While the process of building trust and rapport with clients while following social distancing guidelines does present additional challenges, case managers and navigators can take steps towards strong and effective case management relationships by investing in these early communication points with their clients.

Best Practices to Build Trust with Clients in COVID-19 Adapted Settings

As COVID-19 response guidelines continue to evolve across California, client case management processes will continue to respond by taking place in a variety of adapted formats. This may include conducting case management virtually over the phone or through other technology platforms and in person in adapted workspaces where the client and case manager may be separated by a glass barrier and both be wearing appropriate PPE. Outlined below are a collection of best practices that case managers and navigators can use when working with clients in these adapted settings.

- **When working with new clients for the first time, encourage the client to verify your identity.** Provide the client with your business card, refer them to your organization's website and take extra time to encourage and answer any questions the client may have about you and your work. This is especially important when connecting with a client either remotely or one-on-one outside of the office. During this time of social distancing and high unemployment, case managers and navigators should recognize that there are an increased number of scammers eager and able to prey on vulnerable populations. Take intentional steps to verify who you are, what your organization does, and the nature your work with your new clients. This will both build trust with your clients and model for them steps they can take to verify the identity of someone new.

- **Case Managers and navigators should wear a photo ID name tag in a visible location at all times when working with clients in person.** This includes when working with clients in person in both the community and in the office. The photo on the ID should be a clear photo of the case manager's face that will help clients to see who they are working with. This is especially important if the case manager is wearing a face mask or other necessary PPE. If case managers or navigators are working in a "pod" setting inside an adapted workspace and wearing a face covering they should consider printing a full size photo of their face to show clients. Both being able to see their case manager or navigator's face and knowing that their case manager thought in advance to prepare such a photo will help clients to see their case manager as trustworthy and invested in their success.

- **When collecting sensitive information, share with the client exactly how their information will be used and the specific purpose it is needed for**. Specifically, be clear with the client where their personal information will be recorded, who it will be shared with, and if collecting any documents, when the client can expect the documents to be returned. When possible, the case manager or navigator should share with the client their organization's privacy policy and any specific steps the organization takes to maintain secure data. Sharing this information has the potential to demonstrate case management competency to the client and that the case manager has consideration for any uncertainty the client may have about sharing sensitive information or documents.

- **When working in an adapted case management environment such as a "pod" where the client and case manager are separated by a glass barrier and wearing PPE, consider "dressing" up the space to make it inviting and friendly for the client**. This could include posting flyers on resources or upcoming relevant events in the pod, decorating it with photos from the community, or including a "kids corners" with books or toys that can be easily sanitized between uses for children to enjoy while their parent meets with the case manager. Small additions such as these to socially distanced workspaces have the potential to transform an uncomfortable and foreign environment to one that demonstrates connection to the community and feels safe and familiar.

- **Providing case management services via the phone, a technology based platform, or in a "pod" environment typically take significantly more time than they would normally.** The distance between the client and case manager, either physical or virtual, has great potential to lead to misunderstandings, communication barriers, or technology challenges such as dropped calls that may not otherwise have occurred. Socially distanced conversations may also include additional trust building components as outlined above in "The Components of Trust Building Case Management Conversations" section. Case managers should plan for this extra time when scheduling and preparing for client meetings and phone calls.

- **Direct service teams should recognize that there is no singular successful tactic to build trust with clients remotely** but rather that every client is unique and strategies will need to evolve as the COVID-19 response environment continues to evolve. Building trust and rapport with clients virtually is and will continue to be an iterative process that requires teams to adapt creatively as they engage with their clients.

Coaching Clients on Employment Decisions during COVID-19

As the COVID-19 pandemic continues to unfold, ELL clients are looking to case managers for guidance and support in making decisions about employment. This tool outlines best practices for case managers and navigators in having these important conversations with clients.

Introduction

Coaching ELL Co-Enrollment clients on employment decisions during the COVID-19 pandemic response is a critical and important role played by case managers and navigators. Despite increased health risks, many ELL Co-Enrollment clients may be making choices about taking a job because their family needs income and further, those that are working in essential jobs may reach out to case managers and navigators to ask if they should keep working or quit because of health concerns or an inability to address childcare or other issues in the current environment. **In this decision-making process the primary role of direct service staff is to provide accurate and relevant information to their clients.**

Guiding Principles for Coaching Conversations

Guiding principles for direct service staff in these coaching conversations include the following:

- Searching for, accepting, or continuing employment during the pandemic **is a choice for the client to make**.
- The **role of the case manager is to provide clients with the accurate information** they need to make the decision.
- **Be honest in describing the type of jobs that are currently available** but continue to prioritize the client's preferences despite the limited opportunities available.
- **Ensure the client understands all of their options** if they decide not to search for or accept employment. Work with partners to understand options the client may have for temporary or alternative financial assistance.
- It is reasonable for clients to decide that searching for work or starting a new job is not safe for them right now. **Refusing to search for or accept employment due to safety concerns should not automatically disqualify a client from the ELL Co-Enrollment program.** Work with your supervisor and your team to determine the best path forward for clients in this situation.
- It is reasonable that a client currently working in an essential job may decide to quit out of concerns for their health, dependent care responsibilities, or other challenges**. Help the client understand what benefits they may be eligible for under the Pandemic Unemployment Assistance program if they do decide to quit**.
- To the extent possible, **case managers and navigators should continue to support the client with locating sources of temporary assistance** throughout the pandemic, including unemployment insurance, other benefits programs, and emergency resources available at the local level.
- If the client is searching for and transitioning into employment**, ensure they have the information they need to stay safe, including how to practice social distancing and how to identify symptoms of COVID-19.**

Recognize that this may be a stressful time for clients and practice active listening, empathy, and patience as you engage.

Information for Essential Workers during COVID-19

The following information is for use by ELL Co-Enrollment Pilot Project direct service staff, including case managers and navigators in order to provide information to clients who are either currently working or considering working during COVID-19. It includes basic information about COVID-19 transmission, best practices to mitigate transmission at the workplace, guidance for specific occupations that are generally considered essential during this time period, and guidance on best practices in commuting to and from work.

Introduction

COVID-19 is a new virus that can cause severe and sometimes critical illness in those it infects. The most common symptoms include fever, tiredness, and dry cough and most individuals begin exhibiting those symptoms on average 5 days after exposure to the virus. The COVID-19 virus spreads from person to person through droplets which are created when we talk, cough, and sneeze. People can get infected when they are in close contact (meaning less than 3 feet) to someone who is already infected and these droplets enter their nose, eyes, or mouth. Touching contaminated objects and surfaces can also transfer infected droplets onto your hands which are easily spread to an individual's nose, eyes, and mouth as well. Although people of all ages can become infected, both people over the age of 60 and people with underlying medical conditions such as diabetes, cancer, hypertension and/or cardiovascular diseases, are the most likely to become severely unwell. There is currently no specific treatment for COVID-19 and individuals who suspect they may have it should urgently consult with a healthcare provider[4].

More is being learned and understood about COVID-19 and transmission dynamics every day. It has been recently recognized that individuals who are infected with the virus, but do not have any symptoms (asymptomatic and pre-symptomatic), are able to infect others with the virus. It is unclear currently, the role such individuals play in the overall transmission of the virus, as certainly the majority of transmission is currently understood to occur from individuals infected with the virus who are sick.

[4] Information from the Center for Disease Control and Prevention

Mitigating the Risk of COVID 19 Transmission at the Workplace

Although there is currently no fully assured way to prevent COVID-19 infection, there are a number of best practices individuals can follow in order to reduce their risk of contracting the virus at the workplace and ELL Co-Enrollment direct service staff are encouraged to review these with clients who are working. It may also be helpful to reach out to employers – especially those where a large number of clients work – and offer to support the employer in ensuring all of their workers, including those with limited English language abilities, understand these practices. In some cases, offering to provide interpretation, translation, or connecting employers to language line-type resources may be appropriate.

- **Maintain good personal hygiene.** This includes washing your hands frequently and thoroughly with soap and water, using alcohol-based hand sanitizer when soap and water are not readily available, avoiding touching your face especially your eyes, nose and mouth, and practicing safe respiratory etiquette such as sneezing and coughing into your elbow. Many work places are requiring hand washing at intervals of 30 minutes to one hour.
- **Social distancing.** Keep away from people who are sick and do not let them cough or sneeze on you. Maintain a minimum distance of at least 2 meters or 6 feet between yourself and others at all times. Do not share food, drinks or personal items with others and avoid congregating in break rooms or other areas where groups may form. Many workplaces are using floor markers and physical barriers to help ensure social distancing.
- **Cloth masks**. The use of cloth face masks among the general population, in addition to social distancing and respiratory/hand hygiene measures, may limit the spread of the virus from individuals infected, who have no symptoms and thus are unaware of their infection. Many employers are beginning to provide cloth masks to employees and in many regions, it is required that essential workers wear cloth masks while at work.
- **Minimize sharing of work tools**. You should avoid sharing work tools (e.g. brooms, buckets, pens, phones, computers, desk space) with others. If work tools are shared, they should be disinfected before being passed from one worker to another.
- **Regularly disinfect work surfaces.** You should regularly disinfect work surfaces with appropriate cleaning products and pay special attention to those that are touched by other workers or customers.
- **Stay home if you are sick.** If you are sick with respiratory symptoms or think you may have been in contact with someone who was either suspected or confirmed to have COVID-19, it is especially important to stay home and self-isolate. Call your supervisor to alert them but do not show up at your workplace.
- **Self-isolate at home if possible, especially if there are elderly, immune-compromised, or other especially vulnerable individuals at home.** While tight living space can make this challenging, if it is possible to keep the essential worker(s) in a separate room from the vulnerable household member(s), this is a good practice.
- **Stay home outside of work:** Even though an essential worker may be leaving home more frequently than a non-essential worker, you should still stay home outside of work activities to minimize contact with others. Any and all interactions with others have the potential to unknowingly spread the virus.

Additional general and sector specific guidance for employees on staying safe in the workplace during the COVID-19 pandemic can be found here and is provided by OSHA. In cases where an employer is unwilling or unable to provide their employee, an ELL Co-Enrollment client, with necessary PPE, the grant manager can consider using program funding to support their client with purchasing PPE.

COVID-19 Frontline Employment Risk Factors by Occupation

There are many types of workers that fall into state and local definitions of "essential workers" during COVID 19. The information below covers specific risks and risk mitigation strategies for certain occupations where ELL Co-Enrollment clients may be employed and can be shared with clients working in these jobs or considering employment in these jobs.

Childcare Provider: Children can be infected with the coronavirus and the current data suggests that most have asymptomatic infections. Symptomatic infection in children appears to be uncommon; when it occurs, it is usually mild. Transmission from an asymptomatic carrier has been documented, although we don't know the extent of asymptotic transmission. It is likely that **children are vectors of transmission within this epidemic**, since they have mild or asymptomatic presentations of the disease, struggle more than adults with physical distancing, and often have a lot of respiratory droplets.

Risk mitigation strategies for childcare providers include –

- For childcare providers the best protection against contracting or spreading COVID-19 is **good hand hygiene**. Ensuring that children and the childcare provider wash their hands frequently using proper hand washing technique is essential.
- When possible, educate children **on proper respiratory etiquette**, making sure they understand how to cough or sneeze into either their elbow or a tissue, and immediately throw away all used tissues, followed by washing their hands.
- As appropriate, the childcare provider and children are recommended to **wear glasses** (prescription or non-prescription) to prevent respiratory particles from transmission through the eyes. **Cloth masks or surgical masks**, when available, may also support preventing respiratory particles from entering through the nose and mouth of childcare providers and children.
- Finally, **a strict "no sick" policy** should be enforced. This means that parents should not send their children to childcare if either the child or any other family member is sick.

Grocery Store Employee: Grocery store employees, in a variety of roles, typically interact with a large volume of store customers and individuals from other parts of the store's shipping and supply chain whose health status and past social interactions are largely unknown. Simply by the sheer volume of interactions with store customers that may include touching of common food products, cleaning shared spaces, or handling payment materials, **grocery store workers have an increased risk of coming in contact with an infected individual (who may or may not be symptomatic)**.

Risk mitigation strategies for grocery store employees include -

- Use employer provided **face masks and face shields** whenever possible. If the employer is not providing masks, store employees should find their own protection for the eyes, nose, and mouth to wear at work at all times.
- As appropriate, grocery store employees are recommended to **wear glasses** (prescription or non-prescription) to prevent respiratory particles from transmission through the eyes.
- Many stores are setting up environmental controls to **limit the number of people in a store at a time**. Working with the store owner, **enforcing a 2 meter distance between shoppers and employees** at all times can reduce the spread of the virus.
- When possible and in collaboration with the store owner, set up **plastic panels or another type of barrier between clients and staff** to reduce the transmission of airborne respiratory particles.
- Grocery store employees should **wear gloves** whenever possible and practice good hand hygiene.

Home Health Aide and Nursing Assistants: Home health aides and nursing assistants typically **interact with a high volume of sick people** who may be displaying symptoms of COVID-19 and therefore are at an elevated risk of contracting the virus. Working in a nursing home or nursing facility as a home health aide where workers are interacting with patients in close quarters for an extended period of time, has been identified as one of the most high risk frontline professions for contracting COVID-19. Typical duties such washing patients, changing diapers, and shifting clients into new positions in their beds, put home health aides and nursing assistants at a high risk. While health care workers are critically important to the nation's COVID-19 response efforts, a severe **shortage of Personal Protective Equipment** (PPE) such as gloves, long sleeved gowns, N95 respirator masks, and face shields has been reported across the country. Individuals employed in healthcare during COVID-19 response efforts will need to take additional care to properly sanitize any personal items brought into their workspaces such as their clothes, shoes, personal cell phone, or glasses at the end of each shift. Many healthcare workers have reported **isolating themselves from their families** as well to prevent passing on exposure to the virus. Additionally it is widely assumed that healthcare workers supporting frontline efforts against COVID-19 may be at an **elevated risk of facing mental health challenges** as a result of extended exposure to extremely high stress levels in a hazardous environment.

Risk mitigation strategies for home health aides and nursing assistants include –

- Home health aide and nursing assistant employers should be providing employees with **face protection such as goggles, face masks, or a face shield as well as gloves and a gown**. This personal protective equipment (PPE) should be properly put on, removed, and disposed of following the appropriate health care guidelines. If an employer is not providing PPE, individuals should create their own facial protection with glasses and masks. They should also take precautions by immediately changing and washing their clothes after leaving work and taking a shower when they get home.
- Practice **good hand hygiene** both in between patients and when putting on and removing PPE.
- Home health aides and nursing assistants should **be extremely careful, between leaving their place of employment and taking a shower upon arrival home, to not touch their face**.

Delivery Driver: Although delivery drivers typically have the advantage of leaving a package or order at a front door without having to touch or interact with a client, **the driver typically does not know the health status or social interactions of those that have handled the delivery before them**. Once a product or order is generated it is possible that many individuals, including store associates, line workers, packagers, warehouse workers, and others have handled and created that order before it ends up in the possession of a delivery driver. Each additional person who comes in contact with a package elevates the risk that a delivery driver may be exposed to the virus.

Risk mitigation strategies for delivery drivers include –

- For delivery drivers, **proper hand hygiene** is the #1 best way to mitigate risk.
- **Wear gloves, do not touch your face and wash hands** in between putting on and taking off gloves. A notable risk with glove use is that they can provide a false sense of security. While wearing gloves it is still possible for an individual to touch items or others that could have the virus on them and then touch their face, potentially transmitting the virus to themselves.
- Use employer provided **face masks and face shields** whenever possible. If the employer is not providing masks, store employees should find their own protection for the eyes, nose, and mouth to wear at work at all times.
- **Maintain a minimum of a 2 meters or 6 feet between yourself and others** at all times. Whenever possible, leave a delivery at the front door and do not touch the front door, door bell, door handle, gate or any other part of the area where a package is being delivered.

Meat and Poultry Processing Plant Worker: Although COVID-19 is not known to be transmitted through meat and food products, **the typical working conditions inside most meat and poultry processing plants are highly conducive atmospheres for COVID-19 transmission**. In most plants, employees work in close quarters along busy processing lines where there is frequent close interaction with supervisors and other co-workers. Shifts are generally 10-12 hours, creating a prolonged closeness between co-workers during which time the chances of virus transmission greatly increase. Additionally the physical layout of most plants creates a number of bottlenecks where employees are highly likely to interact with shared surfaces and tools at workstations, bathrooms, locker rooms, breakrooms, and one common entrance and exit.

Risk mitigation strategies for meat and poultry processing plant employees include –

- Follow employer provided guidelines on modifications to workstations, including along processing lines, to **maintain at least 2 meters or 6 feet of distance** from all other individuals in the plant at all times. Whenever possible, do not face others in your workstation.
- Ask the employer what physical infrastructure adaptions have been made to ensure staff safety prior to beginning or returning to work. The CDC and OHSA recommend meat and poultry processing plants **use physical barriers between employee work stations made of curtains, Plexiglas, or another impermeable material.**
- Facilities should also ensure **adequate ventilation in work areas** to minimize employee's exposure. If standing fans are being used, employees should take steps to **minimize air blowing from one worker directly on to another.** Employees should limit the use of personal cooling fans and other devices that could blow the virus from one person to another.
- Ask the employer about using **alternative touch-free clock in/out methods**

- Remove or rearrange chairs and tables in the breakroom and other shared spaces in order to maintain proper social distancing measures between staff. When possible, **consider taking breaks and lunch outside** or in a place safely away from others.
- **Disinfect your workstation and tools** both before and after you use them, and again if anyone else touches them.
- **Wear employer provided PPE including a face shield, gloves and mask**. If the employer is not providing adequate PPE, plant employees should find their own protection for the eyes, nose, and mouth to wear at work at all times.
- **Practice proper hand hygiene** including when taking on and off PPE, using shared spaces such as breakrooms and bathrooms, when clocking in and out, or entering and exiting the plant.

COVID-19 Commuting Guidance

Case managers and navigators can help ELL Co-Enrollment clients think through the best, safest commuting option available to them. In general, using a personal vehicle or walking are the safest options as they limit exposure to other people.

Personal Vehicle. For clients with access to a personal vehicle, this is the safest way to commute to and from work since it limits exposure to others during the commute process. If a client uses their car to drive other workers (carpool), these individuals should practice social distancing to the extent possible in the vehicle, wash hands before and after the commute, and where a cloth mask during the commute.

Walking. Walking to work is a reasonably safe method of commuting, when possible. Walking typically does not put you in close contact with others to the same degree that traveling in the congested and confined spaces of trains, buses, and other public transport options.

Trains, taxis or rideshare, buses and public transport stations are ideal environments for droplet-spreading diseases such as COVID-19 to be transmitted between people. In transport systems it is near impossible to avoid touching shared surfaces. With a huge volume of intermingling people, the potential for transmission is high. These options can be used when necessary, and although there is currently no fully assured way to prevent COVID-19 infection, there are a number of specific best practices individuals can follow in order to reduce their risk of contracting the virus while using public transport to get to work or essential services.

Public Transport: To the extent possible, avoid traveling through public transport systems at peak hours. If you rely on public rail, bus or metro systems to commute to your workplace, consider talking to your supervisor about starting work earlier or later to avoid periods when these systems may be most congested. You can also consider taking a bus or train or using a station which may be less crowded. Any individual using public transport under any conditions should wear a cloth mask over their nose and mouth and wash their hands before and after their trip.

Taxis and Rideshare: Using taxis or rideshares during the COVID-19 outbreak may be relatively safer than using public trains or metro systems as the level of exposure to other travelers is much reduced. However, there is still a risk from touching common surfaces such as door handles, seats, and credit or debit card payment machines. Whenever possible, sit directly behind the driver as you will be less exposed to droplets should the driver cough or sneeze. Individuals using taxis or rideshare should wear a cloth mask that covers their nose and mouth and wash their hands before and after their trip. If unable to wash hands, use alcohol-based hand gel or hand sanitizer.

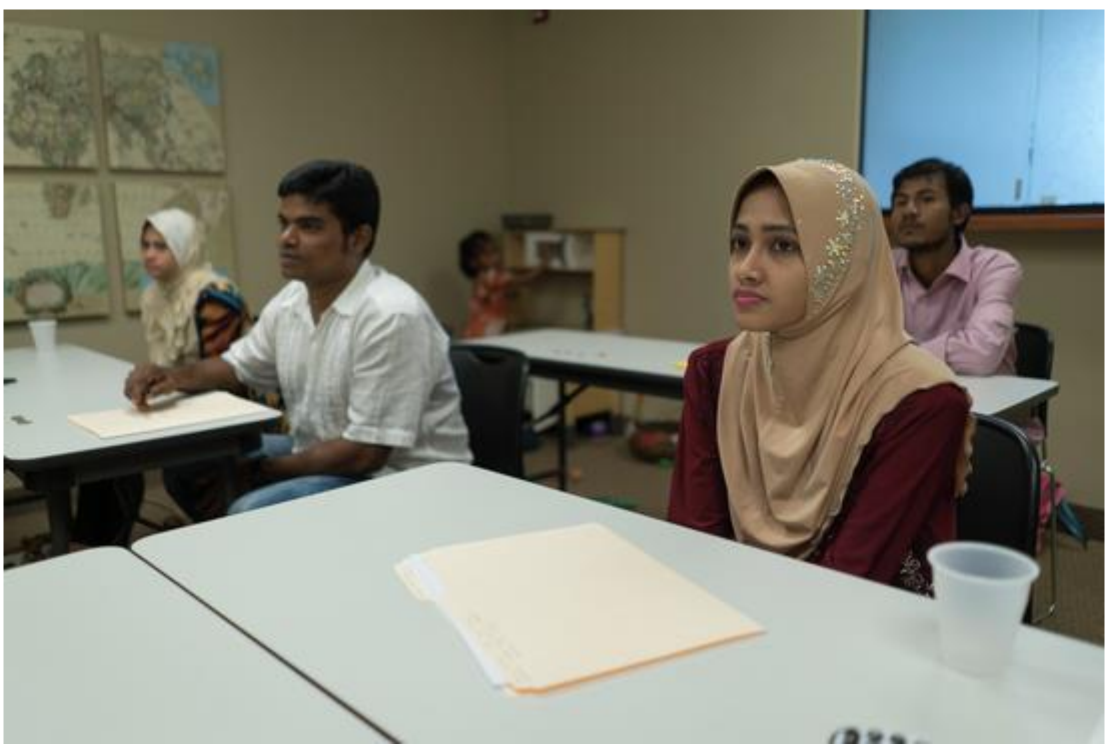
Making Financial Choices in a Time of Economic Hardship

The following resource is intended to be helpful for case managers and navigators in speaking with ELL Co-Enrollment clients who are experiencing significant financial hardship due to layoffs or decreased income as a result of COVID-19.

Introduction

During a period of severe economic disruption where more than 40 million Americans have experienced layoffs and this hardship has disproportionately impacted low-income workers and communities of color, a WIOA-funded provider serving ELLs should be prepared to discuss clients' financial status. Additionally, multiple studies have shown that participants who access both workforce development services simultaneously along with financial empowerment supports have overall higher household incomes and higher net worth than those who access only one type of program. In our current era of economic uncertainty, providing clients with basic support and quality referrals for financial capability services is of ever-increasing importance.

It is critical for case managers and ELL navigators to have a conversation within their project teams about how best to provide support to clients around financial decision-making in a time of economic hardship and ideally, the team will identify current or new partners that can provide this support. Project teams may also decide that case managers and navigators will provide some foundational support on this topic and the following information is designed to guide those conversations and in particular, to make financial decisions during this period of hardship that are least likely to have lasting, negative impacts on the client's financial situation.



Prioritizing Debts: "Choosing Which Debts to Pay First"

During this time of great economic uncertainty, case managers and navigators may find themselves working with clients who are struggling financially and unable to pay all of their bills each month. While outside of the scope of typical case management services, direct service staff may consider providing clients with guidance around prioritizing debt. Whenever possible navigators and case managers should follow up these conversations with client referrals to a partner organizations that provides robust financial education and support services.

Rules for Prioritizing Debts

When working with a client in an economically vulnerable situation who may be choosing which bills they can pay and which they cannot, support the client in considering the following rules for prioritizing debts-

1. <u>Always Pay Family Necessities First</u> – Food and unavoidable medical expenses like necessary medicine always come first and are the most urgent and important. This *does not* include old and outstanding medical bills.

2. <u>Housing Related Bills</u> – Keep up mortgage or rent payments. Support clients in applying for rent and mortgage freezes and relief programs created in response to the COVID-19 pandemic in your local area.

3. <u>Essential Utility Services</u> - Pay the minimum required to keep essential utility services turned on. Note that many communities have suspended implementing shut-offs for non-payment during the COVID-19 pandemic. Support your clients in applying for utility relief programs in your local area.

4. <u>Car Loans and Car Leases</u> – Pay on car loans and leases *only* if a car is needed for essential transportation such as transport to work. If it is the only way to maintain a job, a client may considering moving this up the list, as without a job, other bills cannot be paid.

5. <u>Child Support</u> – Child support debts must be paid.

6. <u>Income Tax Debts</u> – Although income tax debts can be high, the government will eventually collect these unpaid debts by garnishing an individual's current wages or through the annual tax refund process.

7. <u>Student Loans Financed Through the Government</u>- Like income tax debts, the government will eventually collect unpaid student loan debt by garnishing an individual's current wages.

Other types of bills and debt can be considered as lower priority. These lower priority bills and debts, along with additional rules are shared below -

8. <u>Do Not Pay a Bill Based on the Threat of a Creditor or Debt Collector</u> – Bills should not be reprioritized or paid simply because a creditor or debt collector has made a threat. These can include the threat to sue an individual for not paying a debt and the threat to ruin an individual's credit. Most threats are not carried out. Even if a threat is carried out, the process of suing and downgrading credit take time. During this time the case manager may continue to work with their

client to prioritize bills, access additional income options, or refer the client to a partner organization that focuses on financial capability programs.

9. Assess Standing for Defense of Non-Payments – When safe to do so based on local and state health guidelines, consider referring the client to a legal service provider that can assess if the client is eligible to be released from certain debts. One such provider in California is Community Legal Services.

Lastly, case managers should remember that clients must make these decisions themselves. The role of the case manager or navigator is simply to provide information and resources as clients navigate these difficult decisions.

Client Economic Wellbeing Assessment Checklist

As the impacts of the COVID-19 pandemic continue to be felt throughout the economy, English Language Learners remain particularly vulnerable. In California, immigrants make up a significant population of the workforce in the hardest hit industries such hospitality, food service, and tourism. As these industries continue to struggle, ELLs make up a significant portion of the state's population facing threats to their economic wellbeing including the ability to pay rent, bills, and meet basic needs. Working with ELL clients to understand and support their urgent economic needs during this time of uncertainty is of central importance to maintaining their economic wellbeing long term. This checklist tool provides a guide for case managers to use in assessing the economic wellbeing and understanding what responsive actions to take.

Introduction

This tool is intended to help navigators and case managers assess the economic vulnerability of clients and their families through a series of checklist questions in order to collect information that can be used to determine the type of additional support that the client may benefit from. As a reminder, co-enrollment as a strategy is designed to intentionally connect clients to a range of services and supports to maximize their opportunity to be successful in skill building and work. Given the current period of economic hardship, it is important to ensure that project teams are being intentional in gathering information about a client's economic situation. It can be used by project staff both as an initial assessment tool when the client enters the ELL Co-Enrollment program, or as part of a check-in process at regular intervals throughout the client's enrollment.

Instructions for Use

The Economic Wellbeing Assessment can be adapted as needed by case management teams or used in part based on the needs of programs and clients. Case managers and navigators should work with their teams to determine when in the client's enrollment the wellbeing assessment tool should be used and if it will be used in whole or in part.

Instructions for conducting the assessment are as follows.

- The assessment itself can be conducted by the client's case manager either **in person or remotely** over the phone or using a familiar remote connection platform.
- **All results should be recorded and stored** in the client's file (either on paper or electronically) for future use while the client remains enrolled and receiving services.
- **Questions can be translated** or explained as needed.
- When conducting the assessment **the case manager or navigator should remain a neutral provider and receiver of information**. The role of the case manager in this situation is to collect information from the client and later provide recommendations based on the information collected.
- **Final decision-making about the clients' financial path forward rests in the hands of the clients themselves.**

The Economic Wellbeing Assessment Checklist consists of two parts. "Part A: Financial Capability Questions," is a series of 'Yes' or 'No' questions focused on a client's current economic situation. It takes a high-level look at the financial standing of the client, if they maintain a basic budget and savings, and if they may be in financial trouble. The purpose of these questions is to evaluate urgent client needs and provide initial guidance to the case manager on the type of programs the client might benefit from.

The second set of questions, "Part B: Additional Screening," asks the client if they are currently receiving any public assistance benefits and if so, how much money are they receiving monthly. These questions will help the case manager assess additional client needs and eligibilities for additional programs and training components.

Economic Wellbeing Assessment Checklist

Client Name	
ELL Navigator	

Part A: Financial Capability Questions

Are you currently employed?	Yes	No
If employed would you like to work more hours or search for a higher paying job?	Yes	No
If unemployed, would you like to obtain a job?	Yes	No
Have you lost your job due to COVID-19, become the primary caregiver to a family member ill with COVID-19, have no childcare options due to COVID-19, been required to quarantine for 14 or more days due to COVID-19, or otherwise had your ability to work directly impacted by COVID-19?	Yes	No
Do you currently have a personal budget, spending plan, or financial plan?	Yes	No
If you had an unexpected expense or someone in your family lost a job, got sick or had another emergency, would your family be able to come up with money to make ends meet within a month?	Yes	No
Do you currently have a savings account that you regularly add money to for future use?	Yes	No
Over the past month, has your family's spending been less than total income?	Yes	No
In the past month have you been charged a late fee on a loan or bill?	Yes	No
Do you expect to be able to pay your rent or mortgage next month?	Yes	No
Do you expect to have sufficient income to cover your basic necessities such as groceries and essential medicine next month?	Yes	No

Part B: Additional Screening

Are you currently receiving TANF Cash Aid?	Yes	No	Monthly Amount: $______.__
Are you currently receiving CalFRESH/SNAP?	Yes	No	Monthly Amount: $______.__
Are you currently receiving Unemployment Insurance or Pandemic Unemployment Assistance?	Yes	No	Monthly Amount: $______.__
Are you currently receiving any other state or federal benefit?	Yes	No	Monthly Amount: $______.__

Interpreting Results & Next Steps

Based on a client's responses to the questions asked in the Economic Wellbeing Assessment Checklist, the case manager or navigator should be able to determine if the client may benefit from one or more of the following next steps. It is important that project teams recognize that taking these steps may result in a higher or different workload for project staff and project teams should come together to identify a plan for how the partners – collectively and possibly including new partners – will work to ensure that this level of service can be provided.

Enrollment in State or Federal Public Assistance Programs

A client may wish to be considered for public benefit program(s) if they are –

- Struggling to meet their basic needs such as groceries and essential medicines
- They do not expect to be able to pay their rent or mortgage in upcoming months
- They have lost their job or cannot work due to a direct impact of the COVID-19 pandemic

Consider the following next steps if you and your client determine that the client may benefit from enrollment in a state or federal public assistance program –

- Determine which public benefit would meet the client's specific needs
- Screen the client for eligibility
- Support the client with the application process
- Follow up with the client after the application has been submitted to ensure that they were approved and are receiving the correct benefit amount

Enrollment in Local COVID-19 Emergency Assistance Programs

In response to the COVID-19 pandemic, numerous local governments and charitable organizations throughout California have set up funds to support those in their communities who have been directly impacted by COVID-19 with monetary assistance. These programs differ from region to region but many are aimed at those laid off from a particular industry or sector while others are more generally providing direct cash assistance or rent and utility bill payment to individuals and families.

A client may wish to be considered for enrollment in a local COVID-19 Emergency Assistance Program if they are –

- Struggling to meet their basic needs such as groceries and essential medicines
- They do not expect to be able to pay their rent or mortgage in upcoming months
- Can demonstrate that their economic wellbeing has been directly impacted by COVID-19
- Potentially ineligible for traditional public assistance programs

Consider the following next steps if you and your client determine that the client may benefit from enrollment in a local COVID-19 Emergency Assistance Program –

- Determine which local COVID-19 Emergency Assistance Program would meet the client's specific needs
- Screen the client for eligibility

- Support the client with the application process
- Follow up with the client after the application has been submitted to ensure that they were approved and have received the intended amount of assistance

Assistance Finding New or Additional Employment

Depending on a client's unique financial and health situation they may be interested in becoming employed or finding a new or additional job. Particularly during the pandemic, there are many factors that clients must consider when thinking about work, including their financial needs, the type of work available, and personal health risks.

A client may wish to receive assistance finding new or additional employment if they are –

- Currently unemployed
- Employed but interested in getting a second job
- Employed in a job they feel puts their personal health at risk
- Have lost their job or cannot work due to a direct impact of the COVID-19 pandemic.

Consider the following next steps if you and your client determine that the client may benefit from assistance finding new or additional employment –

- Enroll your client in a WIOA Title I program or other program that provides targeted job placement search and support.

Support Making a Personal or Family Budget

If the case manager has been trained in financial coaching or has "in-house" financial coaching services available for clients, the case manager may want to consider supporting their client with creating a budget. Budgeting can be a useful tool to help an individual or family manage their finances. It can be especially helpful in planning to reach a savings goal or when there has been a sudden change in the person's income or expenses.

As a project team supporting ELL clients during a global pandemic throughout which there has been significant economic upheaval, case managers should be prepared to support clients experiencing financial challenges. **This support can include basic budgeting and bill paying conversations but should in most cases be supported by referrals to partner organizations that can provide in-depth support on financial empowerment.**

Attached is a blank budget template that case managers and navigators may use with their clients or share with their clients when supporting them with a budget.

A client may wish to receive support from their navigator or case manager with making a personal or family budget if they –

- Do not have a personal or family budget, spending plan or financial plan that reflects their current income and spending levels

- Have had a recent unexpected expense or change in personal or family income that will impact the client's ability to make ends meet
- Have been charged a late fee on a loan or bill within the past month
- Have earned less than they have spent over the past month

Consider the following next steps if you and your client determine that the client may benefit from working together to create a budget that reflects their current income and spending levels and meets their savings goals –

- Work with your client to complete the attached budget template. In advance of your working session, consider informing your client about what financial information they will need to collect in order to complete the budget.
- Whenever possible, provide your client with either a paper or electronic copy of their budget to take with them, along with blank copies of the budget template for future use.

Referral to a Partner Organization

A case manager or navigator should be ready to provide a referral to an outside or partner organization if the needs of their client fall outside of their available services. Due to the rapidly changing economic environment as a result of COVID-19, many clients may need partner referrals specifically to organizations that can provide comprehensive financial capability training or additional comprehensive monetary assistance.

A client may wish to receive a referral to a partner organization if they are –

- In need of services the case manager's organization is unable to provide
- In severe economic turmoil

Consider the following next steps if you and your client determine that the client may benefit from a referral to a partner organization –

- Whenever possible, provide a warm hand off between your client and the partner organization
- Follow up with your client to make sure they are receiving the services they expected from the referral

Budget Template

This client budget is for:	
The client’s entire household	The client only

Monthly Earned Income	
Income Source	Amount
Job 1 (after taxes)	
Job 2 (after taxes	
Self-Employment/Business	
Other Household Member Income	
Other Earned Income	
Total Monthly Earned Income	

Monthly Public Benefits	
Income Source	Amount
TANF Cash Aid	
CalFRESH/SNAP	
Unemployment Insurance or Pandemic Unemployment Assistance	
Other Public Benefits	
Other Income	
Total Monthly Public Benefit Income	

Expenses	
Expense Item	Amount
Housing	
Rent/Mortgage	
Taxes & Home Maintenance	
Utilities	
Gas	
Electric	
Water/Sewage	
Landline/Cell Phone	
Health	
Health Insurance	
Prescriptions (Other)	
Transportation	
Car Payment	
Gas	
Car Insurance	
Public Transportation	
Groceries	
Food	

Dining Out/Other	
Personal Expenses	
Cable & Internet	
Laundry	
Tobacco & Alcohol	
Clothing & Accessories	
Childcare	
Daycare	
Child Support	
Credit Cards & Loans	
Monthly Credit Card Payments	
Student Loans	
Other Loans	
Total Monthly Expenses	