2016 SUMMER INSTITUTES

CLERICAL AND OFFICE ASSISTANT INSTITUTE
TRAINING FOR TRAINERS INSTITUTE
FISCAL ESSENTIALS INSTITUTE
EMPLOYMENT SERVICES: FAMILY ENGAGEMENT INSTITUTE

UC DAVIS EXTENSION
CENTER FOR HUMAN SERVICES
CONTINUING AND PROFESSIONAL EDUCATION
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THE EXPERIENCE

A college campus—the ideal place to learn and explore.

A social services institute—an ideal time to examine issues and assess practices.

Each year, managers, supervisors and workers from across the nation come to UC Davis. Our institutes offer unique opportunities to learn new techniques for efficient, sensitive delivery of services.

The Impact

Intensive learning takes place in lectures and workshops. Instructors discuss timely topics, stimulate thought and encourage interaction. Conversations during breaks, at meals and in residence halls enhance the learning process. Back at the office, participants apply new concepts to enhance their work. The connections they make allow them to continue the exchange of ideas and information.

The Center

The Center for Human Services’ institutes, on-site programs, seminars and conferences provide training for every level of employee. We believe managers and staff who develop new skills can do a better job for their agencies and their clients. That’s our goal—to help agencies provide better client-oriented services.
ABOUT THE INSTITUTES

Schedule
Participants check in starting on the evening before the institute. Dinner will be provided during the evening opening keynote. Institute workshops run from 8:30 a.m. to noon and 1-4:30 p.m. The final session is held on the morning of the last day, and the program ends following lunch and a closing keynote.

Facilities
Lectures and workshops take place at the UC Davis Activities Recreation Center (ARC). Institute participants will lodge in the Segundo Residence Hall, one block from the ARC, in comfortable dormitory-style rooms. Each participant will have their own private sleeping room. The hall also features gender-specific shared bathroom suites, a courtyard, social lounge, TV lounge, laundry room and parking. Breakfasts, lunches and dinners will be served in the nearby Segundo Dining Commons adjacent to the ARC.

Enrollment Information
Enrollment in each institute is limited, so please enroll early to reserve your space. Enrollment is available online for your convenience at: www.centerforhs.net/summerinstitutes

About UC Davis
UC Davis is the home of the Aggies—go-getters, change makers and problem solvers who make their mark at one of the top public universities in the United States. Our 5,300-acre campus is in the city of Davis, a vibrant college town of about 68,000 people, located in Yolo County just 15 miles west of Sacramento. With more than 40 miles of bike paths in town and on campus, Davis is known as the “City of Bicycles.” Summer days are sunny, hot and dry, with evenings cooled by marine breezes. Some of California’s most beautiful regions are within a two-hour drive, including San Francisco, the Napa Valley, the Gold Country and Lake Tahoe.
The Clerical and Office Assistants Institute provides valuable information and learning experiences to help participants reach their career advancement goals and/or achieve greater job satisfaction.

Participants will build upon the skills they already possess—just what's needed in order to provide valuable support to your organization. For office assistants and clerical staff who are just starting out, the Institute will provide workshops on strengthening organizational and customer service skills. Those with more experience can go beyond fundamental skills to higher-level workshops that explore proven ways to work with teams, communicate effectively and “manage-up.”

Who should attend: This session is open to all staff from beginning clerical to management: clerks, eligibility workers, employment services workers, social workers, line staff, supervisors and managers. The goal is to have participants leave with increased inner power, energy, strength and confidence, believing that every single thing they do matters.

WORKSHOPS

Organizing Your Work and Work Space
- Identifying personal and work management styles
- Setting goals and priorities
- Planning and scheduling
- Organizing your work area
- Overcoming obstacles to effective time management

Customer Service
- Defining excellent customer service and experience
- Being outcome focused: “How are the lives of our customers different because they’ve come to our agency?”
- Creating customer engagement as helping professionals
- Communication skills that create an excellent customer experience
- Addressing barriers to excellent customer service

Managing Up (panel discussion)
- Discover how clarifying questions prevent drama
- Saying “no” without being sorry
- Delivering messages to others on the boss’ behalf
- Solid tips for handling surprises
- Recommending tactics for supporting multiple bosses

Self-Care
- Stress reduction strategies to prevent burnout
- Discover how emotions can work for you instead of against you
- Practice empowering through patterns to lighten your load
- Break free from boundary busters that compromise self-care

FACULTY

Andrea Brown, M.Ed., CPC, MBA, is the founder and principal of Monday Best Coaching and Consulting. She is a certified professional coach (CPC) through the Institute for Professional Excellence in Coaching and has completed the Pacific Institute’s “Investment in Excellence Program,” which is an internationally recognized developmental program based on extensive research in the field of cognitive psychology and human learning theory. Brown holds a master’s degree in adult education from Old Dominion University in Norfolk, Virginia, and an MBA from St. Mary’s College in Moraga, Calif. She is a former chair of the board and a current advisory board member of the California Counseling Institute, a nonprofit counseling center in San Francisco.

Corry March is a professional certified coach, credentialed by the International Coach Federation. She specializes in team development, interpersonal relationships, communication and conflict resolution. In her popular workshops, March helps clients tackle essential workplace responsibilities such as giving and receiving feedback, stepping into new leadership roles and promoting employee ownership. She facilitates the critical process of navigating personal and organizational change, and with her eye for strengths and engaging coaching style, she also helps troubled teams pull together and produce the results they need.
Staff development plays a key role in forming and maintaining agency culture while ensuring that members of their staff are provided with the knowledge, skills and resources needed to perform their jobs. Trainers and staff development coordinators must continuously refresh their own base of knowledge and methods in order to provide relevant and up-to-date services in their organizations. Whether delivering formal instruction or providing informal consultation, coaching and support, the training team’s challenge is to provide valuable workplace learning experiences that reinforce best practices. The Center for Human Services is committed to assisting agencies in reaching their planned instructional outcomes for their staff. A primary focus of this Institute will be on promoting the development of agency-wide transfer of learning systems, curriculum design, evaluations and professional presence. The goal is for participants to identify and use training approaches that are cost-effective and tailored to respond to the agency’s specific learning needs, resulting in a rapid integration of learning that leads to enhanced workplace performance.

Who should attend: This session will prove to be a relevant and valuable learning experience for anyone who is interested in staff development. Trainers, supervisors, training managers and analysts have attended in the past and report that they gained information and skills which enhanced their expertise.

**WORKSHOPS**

**TRACK 1 (ALL DAY)**

**Training for Trainers (adult learning theory)**
- Presentation design strategies
- Engaging and motivating adult learners
- Delivery that is inclusive of diverse learning styles
- Information processing interventions that enhance retention and promote the transfer of learning

**Public Speaking and Professional Presence**
- Learning multiple techniques for speaking confidently in front of groups
- Gaining control of meetings and conveying information with authority
- Enhancing professional networking and improving small talk

**TRACK 2 (ALL DAY)**

**Evaluations**
- The role of evaluation in a performance improvement system
- Deciding what should be measured
- Challenges and benefits of evaluation
- Determining the appropriate level of evaluation
- Optimal ways to evaluate performance

**Transfer of Learning and Curriculum Design**
- Visually illustrate transfer: driving and restraining forces that affect trainees before, during and after training
- Demonstrate the impact of action and inaction of key individuals in the learning transfer process
- Recognize reasons for lack of transfer of learning from the workshop to the work space

**FACULTY**

**Steve Cozart** is a trainer, actor and coach who has more than 20 years of experience in public speaking, presentation skills, customer service and management consultation. He is certified by the International Coaching Federation as an associate certified coach. Cozart helps his clients learn how to be more comfortable in the spotlight, improve presentation skills, command a room, hold a group’s attention and thrive in challenging and dynamic environments through the use of acting techniques.

**Dale Curry, Ph.D.** coordinates evaluation for a trainer development certificate program in collaboration with the Northeast Ohio Regional Training Center. He is the principal investigator for two statewide training evaluation projects in Ohio, and he served as the consultant to the American Humane Association on its comprehensive evaluation of the Pennsylvania Competency-Based Child Welfare Training and Certification Program.

**Michael Lawler, Ph.D.** is dean and professor in the School of Health Sciences, University of South Dakota. His research interests include health disparities, child well-being, transfer of learning and forensic psychology. Lawler previously served as the director of the Center for Human Services at UC Davis Extension and co-director of the Center for Public Policy research at UC Davis. With nearly 30 years of experience, he holds a Ph. D. in human development from UC Davis and M.S.W. from UC Berkeley and is a licensed clinical social worker.

**Jo Newell** is the CLO of his learning/consulting business, 2B. A master trainer, learning consultant and motivational speaker, Newell is nationally recognized for the creativity, energy and passion that accompanies his work. Newell’s LearnShop, The Art of Training, consistently receives recognition for innovation, excellence and learning opportunities by national audiences. Combining recent research by neuroscientists, multiple intelligence theory and accelerated learning, Newell creates a learning environment of discovery that inspires participants. He also holds a graduate degree from Yale University.
FISCAL ESSENTIALS INSTITUTE

September 7-9

The fiscal responsibilities in social services agencies are demanding and varied. Those with fiscal responsibilities are often expected to be a manager, supervisor, analyst, skilled technician and advisor. County administrators and program managers exert pressure for quality service from fiscal representatives. Those with fiscal authority are expected to understand the financial impacts for all programs and provide detailed analysis and recommendations to administration and program managers. They must also act as an interpreter so program staff can understand the implications of funding and claiming on their programs. In order to accomplish these varied and difficult tasks, fiscal managers must continually dedicate time to update their professional practices and to remain current on all program changes and fiscal policy decisions.

This institute provides fiscal administrators an opportunity to learn and update their professional practices and connect with their peers who can share hands-on experience. This session takes participants through an entire fiscal year. The training covers key concepts, practices and tools, and provides access to professionals who will contribute the academic and practical guidance required for a good fiscal manager.

Who should attend: County program managers and analysts, fiscal and budget staff, new administrators and anyone needing to know how to (and what can) fund their programs.

WORKSHOPS

Note: The topics for this institute will be updated. An advanced track is currently being planned for this institute. This brochure will be updated once all new topics are finalized.

Funding – Explore All Sources
- State
- Federal
- Realignment
- Grants

Allocations
- Methodologies for all allocations
- Maximizing funding sources

Time Studies
- Cost allocations
- Claiming methodology

Mock Claim
- Value of a mock claim in testing and validating revenue, budget projections and policy changes
- Approaches to developing a mock claim
- Tricks and traps to the process

Close Out and Year-End Reconciliation
- Adjustments
- Balancing the books

State Budget Process
- Subvention process
- Budget review and analysis

Introduction to Programs
- Overviews of social services programs
- Connecting financial analysis to programs

Claiming
- Claiming rules for administration and assistance
- Best practices
- Claiming simulations
- Claiming tools
- Claiming reports

County Budget Process
- Identifying needs
- Fiscal forecasting

Management Reporting
- Spending plan
- Reporting financial outcomes

FACULTY

Carol Haynes, MBA, has worked in social services for the County of Napa for more than 30 years. Her current position is deputy chief fiscal officer. Haynes graduated from Golden Gate University with an MBA with a concentration in accounting, and also holds a CPA degree.

Jennifer McClain has 20 years of experience in human services. She gathered most of her experience in the Mariposa County Department of Human Services, where she worked for over 18 years. She has worked in various capacities in social services, including eligibility, employment and training, system support and fiscal. McClain’s current position is as the assistant chief fiscal officer at Marin County Health and Human Services, where she financially administers Social Services, Veterans, Aging and WIOA programs and grants.
Family engagement requires the ability to establish and maintain a partnership with family members. None of these are possible without a strong relationship with the family. As a result of the introduction of Family Stabilization, tighter budgets and soaring caseloads, CalWORKs, WIA, Employment and other agency programs face new challenges and opportunities in serving a more diverse client population. This Institute will provide managers, supervisors and line staff—who are serving in diverse roles within CalWORKs, WIA, One Stops or other community partnership programs—with new information, knowledge, skills, tools, best practices, program models, strategies and resources to further enhance program outcomes and their clients’ success toward achieving employment and self-sufficiency.

Who should attend: Managers, supervisors, employment specialists, integrated eligibility caseworkers, vocational counselors, resource specialists, trainers, facilitators and key specialized human services professionals serving in CalWORKs, Employment, WIA, One Stops or diverse community partnership programs throughout California are encouraged to attend.

**WORKSHOPS**

**Motivational Interviewing**
- Motivation theory and working with clients
- Principles and strategies of MI
- Change talk
- Active and reflective listening and coaching

**Barriers and Creative Engagement Strategies**
- Common barriers to self-sufficiency
- Dynamics of family violence, substance abuse, mental health, homelessness and other issues
- Principles and techniques of strength-based assessment and case management
- Team approaches to addressing barriers

**OCAT Assessments to Service Plans**
- Maintaining a strengths-based, family-focused approach
- Being respectful and mindful of boundaries
- Increasing trust and communication
- Supporting tradition and honoring the family
- Observing and assessing the situation
- Techniques to deal with potentially violent situations
- Formula for determining client and family needs
- Interpreting assessment data/outcomes
- Using assessment outcomes to plan client and family goals
- Referrals to community services
- Case management models: intensive and integrated
- Case management skills
- The case management relationship

**FACULTY**

**Geni Cowan**, Ph.D., has been a trainer with the Center for Human Services since 1991. Her areas of expertise include organizational development, leadership and management, cultural diversity, case management, the Indian Child Welfare Act (ICWA), substance abuse and HIV/AIDS. She has worked extensively with public social services agencies. Cowan has worked with Native American communities in the area of professional development in Tribal TANF programs and intensive case management. She is also a senior consultant with Eagle Blue Associates, providing services such as expert witness testimony in ICWA cases. She is a professor in the Educational Leadership program at California State University, Sacramento.

**Christine Ly** has dedicated the past 13 years to easing the burdens of her clients and staff. Ly is known for her creative engagement skills in decreasing Welfare-to-Work sanctions, increasing client involvement, and applying efficient case management techniques that ultimately increase work participation rates and client self-sufficiency. She has worked in multiple specialized units, including Linkages, Self-Initiated Programs, Domestic Violence, Job Skills Placement, Continuing, and Employment and Eligibility, and she is currently the primary Employment Services Branch Induction and Transition (as well as OCAT) trainer with Merced County.

**Andrea Pomicpic** serves as the Citywide Staff Development and Training manager for the City of Oakland. In the most diverse city in the nation, Pomicpic builds on her subject matter expertise in cultural humility, implicit bias and equity training. She also has a background in training human services topics such as eligibility, family engagement, multi-barrier components, employment and training and serving diverse communities. She has worked as an eligibility worker, employment and training worker and a program coordinator at Merced County Human Services Agency.
FOR MORE INFORMATION AND HOW TO ENROLL

QUESTIONS?
Please contact Ginah Monroy at the Center for Human Services.
Phone Ginah at (530) 757-8553 or email glmonroy@ucdavis.edu.

ENROLLMENT INFORMATION
Please enroll by July 29, 2016, although enrollments will be accepted as long as space is available.
Enroll online at www.centerforhs.net/summerinstitutes

Enrollment fees
The institute enrollment fee is $1,777.50 per person for the three-day Institute. This fee includes campus lodging, meals, all Institute materials and daily parking permit (when necessary). At the time of enrollment please include either pre-payment, purchase order or a letter of authorization to bill. County agencies that have training contracts with UC Davis may choose to use training units from their current UC Davis training contract (FY 16-17). The exchange rate is two enrollments per one training unit or one enrollment per one-half training unit. Contact your UC Davis training coordinator if you are enrolling in an institute using contract training units.

Important: There is no discounted fee for daily commuters or for those who choose to arrange their own lodging accommodations. Commuters will receive meal cards for meals for which they are present.

Institute refunds and cancellations
If your plans change, the enrollment fee is fully refundable until five working days before an institute. After this time a $200 administrative fee must be charged to cover guaranteed housing and meal costs. The administrative fee will be billed or deducted from a check to refund prepaid fees. Enrollments and reservations are transferrable to other individuals. Participants may withdraw by phone or in writing.