



California Automated Response and Engagement System (CWS-CARES) Leadership Toolkit

Contents

Why This Leadership Toolkit Exists	2
How This Leadership Toolkit is Organized	2
Your Role as a Change Leader.....	2
Section 1 - Own the Narrative	5
1.1 Leadership Action Calendar	5
1.2 Core Talking Points for Leaders (Overarching and Audience-Specific).....	8
Section 2 – Rally Your Team.....	12
2.1 Quick Self-Check: Where Is My Team Today?.....	12
2.2 Guide for Introducing the Change to Your Team	14
Section 3 – Leading Through the Transition to CWS-CARES	16
3.2 Managing Resistance	17
3.3 How to Have Difficult Conversations.....	19
3.4 Leading Through Transition	22
3.5 Leading Through Ending, Losing and Letting Go.....	23
3.6 Leading Through the Neutral Zone	24
3.7 Leading into the New Beginning	25
Section 4 – Sustaining the Change.....	26
4.1 What Leaders Should Expect After Go-Live	26
4.2 The Impact of Celebrating Wins.....	28
Section 5 – Resources	29
5.1 Where can I go if I have questions or feedback?	29
5.2 Links to Additional Resources.....	29
Conclusion.....	30
Appendix.....	31

Why This Leadership Toolkit Exists

How you talk about the transition to CWS-CARES, and how you show up during the transition, has a powerful impact on how confidently your teams move through change. With clear, practical guidance, you can create consistency, inspire confidence, and help your teams navigate the transition with greater clarity and momentum.

This toolkit provides tools, conversation guides, and resources you may use to lead your teams through the CWS-CARES implementation to promote the organizational changes that follow. You have a pivotal role in shaping a smoother, stronger path forward, and this toolkit is here to support you every step of the way.

How This Leadership Toolkit is Organized

This toolkit is organized into five sections that follow the natural progression of a change effort, from understanding what is changing, through preparation and implementation, to reinforcement and ongoing support.

You can move through the sections in order or go directly to the section that fits your current need.

Go to section...	When you need to...
1. Own the Narrative	Understand the change and explain it clearly
2. Rally Your Team	Start the conversation and engage your team
3. Leading Through the Transition to CWS-CARES	Prepare for questions, obstacles, and lead your team through the transition itself
4. Sustaining the Change	Reinforce new ways of working and recognize progress
5. Resources	Find resources, contacts, or additional help

Your Role as a Change Leader

Your role as a change leader will be to support the change on the front lines, directly interacting with staff and supporting the transition with minimum disruption. Recognize that you won't be alone in this endeavor – there is no singular change leader, and work can be shared among a network of leadership teams all moving towards the common goal of helping their staff best support children and youth interacting with California's child welfare system.

As a change leader, ensure you stay aligned with your county's implementation partners. Connect regularly with your Implementation Coordinator, OCM Coordinator, Training Coordinator, and SPOC to review their plans, share upcoming team needs, and confirm that the messages you deliver to staff match county and statewide guidance. Routine check-ins with these partners help you stay ahead of key milestones, coordinate support, and provide your team with accurate, consistent information throughout the transition.

These check-ins will also help you own the narrative by understanding the change and being able to explain it clearly. Next, you'll need to rally your team and start the conversation to engage your team. Then, you'll prepare to lead the team through the transition. This includes possibly saying goodbye to the previous way of doing things and introducing the new system. Reinforce the transition to CWS-CARES as a leader – encouraging staff and recognizing project successes.

Over the course of the transition, you may face difficult situations such as tense conversations or resistance to change. Demonstrating authenticity and continuing to build trust will help staff become more comfortable with the change and embrace a new way of working. The following tools and resources can help to establish a foundation to foster communication and break down barriers for change.

Leadership Checklist

Take a moment to complete the Leadership Checklist. This checklist provides a simple, practical way to stay focused on key actions to take before, during, and after go-live. It highlights core behaviors that build clarity and confidence for teams moving through the CWS-CARES transition.

By using the *Leadership Checklist* (Appendix A), you can help to ensure you are actively supporting your teams at every stage of the change, by reducing uncertainty, reinforcing consistent guidance, and helping your teams move forward with greater momentum.

Before go-live

- ☐ I understand what is changing and why, well enough to explain it without notes
- ☐ I have reviewed the [CWS-CARES V1 project timeline](#) and know the key dates my team needs to hear about from me
- ☐ I have identified which team members may need extra support during the transition

- ☐ I have a consistent explanation ready that I can repeat the same way every time

Note: Review sections one and two of the Leadership Toolkit if unable to complete all items on the “before go-live checklist”

Week of go-live

- ☐ I am checking in with my team more often than usual, not less
- ☐ I am visible and available, not just sending written or email updates
- ☐ I am listening to concerns before they turn into resistance
- ☐ I am using the new system myself, not just describing it

Note: Review section three of the Leadership Toolkit if unable to complete all items on the “week of go-live checklist”

After go-live

- ☐ I am still talking about the change, not treating it as finished
- ☐ I am recognizing effort and early wins, not only tracking metrics
- ☐ I am checking whether my team has what they need to succeed long term

Note: Review section four of the Leadership Toolkit if unable to complete all items on the “after go-live checklist”

Section 1 - Own the Narrative

As a leader, your team(s) will look to you to help them understand what CWS-CARES means for them. “Owning the Narrative” means being prepared to clearly, confidently, and consistently communicate the Case for Change. The Case for Change articulates why CWS-CARES is needed, what is changing, and what the transition means for California Child Welfare.

View the [CWS-CARES Case for Change video](#) on the [OCM Implementation Portal](#).

When you own the narrative, you help to create a consistent understanding of the change while making space for honest dialogue. **You don’t need to have every answer.** Your responsibility is to communicate what you know with clarity, acknowledge what you do not know yet, and to help your team stay connected to the purpose behind the transition.

This section provides tools to help you make the Case for Change your own. You will find resources to help you explain the “why” behind CWS-CARES, communicate key milestones, tailor messages for different audiences, and have meaningful conversations with your team.

What does it mean to own the narrative?

Know the Case for Change, connect it to your team, communicate it consistently, create space for questions, and reinforce the “why” throughout the transition.

When is the best time to own the narrative?

Confidently owning the narrative does not happen in a vacuum - it’s an ongoing, iterative series of conversations, communications, and moments designed to guide the team toward a unified direction of change.

Helpful Links:

- [CWS-CARES Case for Change Video](#)
- [CWS-CARES Change Impact Tracker](#)
- [CWS-CARES Explorer](#)

1.1 Leadership Action Calendar

The *Leadership Action Calendar* (Appendix B) offers suggested messaging and timing that you can use as a guide when developing your own organizational communications.

Its goal is to help you foster transparency, increase visibility, and ensure meaningful stakeholder engagement throughout the transition.

Weeks to Go - Live	Focus	Leadership Actions
<i>T - 11 weeks</i> <i>Week of 9/21</i>	▪ Communicate the Change ▪ Align and Re-connect ▪ Establish a Communications Rhythm	▪ Explain or reinforce “why” we are transitioning to CWS-CARES. Help staff keep the purpose and importance of CWS-CARES in the forefront of their thinking. ▪ Set expectations for the road ahead. Reinforce the December 7, 2026, Go-Live date and explain how the weeks before Go-Live will be used to prepare. ▪ Make CWS-CARES a regular topic in existing team meetings and huddles. Ask staff what they understand, what they are hearing, and what questions or concerns they have. Celebrate wins to recognize progress being made.
<i>T – 10 weeks</i> <i>Week of 9/28</i>	▪ Understand the Change ▪ Clarify Roles and Responsibilities ▪ Reinforce Project Information ▪ Surface Concerns	▪ Help to make the change relevant for your staff. Review change impacts affecting your team and translate them into what staff can expect in their day-to-day work. ▪ Guide staff not only on what they need to learn, do, or prepare before Go Live, but also on how and when they will do it. This includes setting clear expectations, providing structured time for learning and practice, and giving staff regular opportunities, such as weekly or daily sessions, to practice in the Production Simulation environment. ▪ Share information from trusted project sources and clarify what is known versus still being determined. ▪ Share recurring questions, identified resistance, or readiness concerns with your OCM Coordinator, Implementation Coordinator, SPOC, or other appropriate project contact. Submit your recurrent inquiries to the Inquiry Response Team, so it can be raised for broader project awareness.

Weeks to Go - Live	Focus	Leadership Actions
<i>T – 8 Weeks</i> <i>Week of 10/12</i>	- Encourage Hands on Practice - Connect Learning to Work - Identify Confidence Gaps	- Ask staff to continue practicing workflows most relevant to their roles in the Production Simulation environment. Ensure staff are aware of self-guided CWS-CARES training resources including, Quick Reference Guides, Training Guides, and videos. Also encourage staff to take advantage of in-app Enablements to assist them in getting more comfortable with CWS-CARES. - Discuss what staff are learning and how it applies to their current work responsibilities. - Ask staff which tasks or processes they feel prepared for and where they need more practice or support.
<i>T – 6 Weeks</i> <i>Week of 10/26</i>	- Pulse Check Your Team - Evaluate Beyond Training - Escalate Risks	- Query your team using some questions like: What do you feel prepared for? Where are we still uncertain? What could/is preventing us from being ready? - Don't just look at training completion statistics as an indicator of readiness. Consider other factors like employee confidence, understanding, access/permissions granted in CWS-CARES, and degree of impact from process changes. - Raise issues that cannot be resolved locally through established project channels.
<i>T – 4 Weeks</i> <i>Week of 11/9</i>	- Prepare for the New Normal - Know How Work Will Get Done - Know the Support Model	- Set realistic expectations and talk openly about the learning curve. Discuss the adjustment period that will accompany Go-Live. - Review operational priorities, staffing coverage considerations, critical workflows, and applicable local procedures to support a smooth cutover period and Go-Live. - Ensure staff know where to go for support including who their Super Users are, where to find resources, how to request help, and how issues will be escalated. Affirm to staff that they are not expected to know all the

Weeks to Go - Live	Focus	Leadership Actions
		answers but are expected to know how to access support.
<i>T – 2 Weeks</i> <i>Week of 11/23</i>	▪ Build Confidence ▪ Pulse Check Your Team ▪ Reinforce Key Messaging ▪ Recognize the Work	▪ Follow-up on outstanding training, access, process support, or operational concerns. ▪ Ask staff what could still prevent them from being successful on Day 1. ▪ Focus on what staff need to know and do during the system cutover before Go-Live and what they need to do during Go-Live rather than introducing unnecessary new information. ▪ Recognize the preparation staff have completed and reinforce that support will continue after Go-Live.
<i>T- 0</i> <i>Go-Live on 12/7</i>	▪ Be Visible and Accessible ▪ Promote Available Support ▪ Listen for Patterns ▪ Recognize Progress	▪ Proactively check-in with staff rather than waiting for issues to reach you. Designate a secondary point of contact that is available to support staff if you are not available. ▪ Reinforce support channels and direct staff to established resources. Discourage unsupported workarounds. ▪ Identify recurring questions, barriers, or operational impacts and escalate them quickly to your designated OCM Coordinator, Implementation Coordinator, or SPOC. ▪ Submit your recurrent inquiries to the Inquiry Response Team, so it can be raised for broader project awareness. Celebrate early wins and acknowledge staff who are helping others adapt.

1.2 Core Talking Points for Leaders (Overarching and Audience-Specific)

60-Second Elevator Pitch

A short and easy to memorize explanation that any leader can repeat the same way every time.

“In December 2026, CWS-CARES will be California’s new, statewide child welfare case management system. Not just a change to a modern technology system, CWS-CARES will further our ability to improve the safety, permanency, and well-being outcomes for children and families. It will reinforce the Integrated Core Practice Model, provide more detailed data to support our rigorous program evaluation and continuous quality improvement efforts, and will support exchanging data with an array of partners.”

Overarching Talking Points (The Case for Change)

Use these talking points as a consistent foundation for how you explain the CWS-CARES transition. Start with the reason why the change is needed, followed by the benefits it brings to staff and families, as well as reinforcing what could be at risk if California were to continue relying on an outdated system.

1. Why We Are Changing

- a. California’s child welfare work has outgrown the legacy CWS/CMS system, which is nearly 30 years old and forces staff to rely on paper files, spreadsheets, and multiple disconnected tools
- b. Today’s child welfare practice requires faster access to information, clearer documentation, and systems that reflect the complexity of real casework
- c. CWS-CARES is being implemented to meet federal CCWIS requirements and support programs like the Family First Prevention Services Act (FFPSA), ensuring California child welfare continues to operate in compliance with state and federal regulatory organizations and industry best practices
- d. Most importantly, outdated tools create administrative bottlenecks that take time away from the core of the work, like engaging with children, families, and caregivers. An updated system helps assure the safety, permanency and well-being of children at risk of abuse, neglect or exploitation

2. How CWS-CARES Helps (Key Benefits)

- a. A Single, Modern System
 - i. CWS-CARES replaces CWS/CMS with a web-based, flexible, scalable platform built on Salesforce, connecting information at the person level - reducing the need to move across multiple systems while supporting a person-centric practice
- b. Cleaner, Faster Documentation

- i. One location for most casework activities
 - ii. Contact notes available directly within the case, with substantially increased character limits
 - iii. Clinical assessments are integrated into CWS-CARES, which means no second login and no re-entry
- c. Better Navigation and Search
 - i. Robust searching and filtering capabilities, searchable documentation, easy access to dashboards, clickable hyperlinks, and multiple tabs for seamless multitasking
- d. Real-Time Support
 - i. Reminders, notifications, risk indicators, and guidance tooltips embedded throughout the system help staff to stay on track and reduce missed or incomplete information
- e. Anywhere Access
 - i. Cloud-based design is accessible from county-approved devices with secure internet, supporting field work and remote environments
- f. Streamlined Work Across the Entire Lifecycle
 - i. Intake, Case Management, Resource Family Approval (RFA), Eligibility, Financial Management, Courts, Resource Management, and Reporting all benefit from modernization
- g. More Time for Families
 - i. By reducing administrative burden and simplifying data entry, workers can spend more of their time in the field providing services, instead of navigating complex legacy workflows

3. What Happens If We Don't Change

- a. Remaining on CWS/CMS (and ancillary systems such as paper, spreadsheets, and manual workarounds) creates ongoing risk of incomplete data, inefficiencies, inconsistent practices across counties, and reduced data integrity and security
- b. Without modernization, staff lose valuable time to outdated processes, which in turn increases burnout and reduces time with children and families
- c. California risks falling out of alignment with federal CCWIS requirements, limiting opportunities to support new policy initiatives, modernizing statewide child welfare practice, and incurring costly penalties for noncompliance

- d. The challenges agencies face today (fragmented information, duplicated work, lost productivity, and insufficient tools for decision-making) will only grow
- e. Not transitioning to a modern system means child welfare staff will continue to struggle to “piece together” a full case picture, slowing down services and making it harder to support the state’s most vulnerable population

Section 2 – Rally Your Team

Your team will rely on you not just to explain the change, but to help them engage with it. Rallying your team means creating the conditions for real conversation, where people feel informed, included, and safe to ask honest questions. As a change leader, you set the tone that this transition is both important and supported. You don't need to have every answer right away, but you do need to be ready to listen actively, acknowledge concerns, and guide your team toward understanding what CWS-CARES means for their daily work.

Use the tools in this part of the toolkit to help you start meaningful conversations, gauge where your team is emotionally and operationally, and tailor your messaging so people feel prepared (not surprised) as the transition moves forward.

When should I rally my team?

Begin discussing the change and preparing your team well ahead of the go-live date. Refer to the [Leadership Action Calendar](#) for guidance on the specific types of communications to deliver and the timing for each.

2.1 Quick Self-Check: Where Is My Team Today?

Think about where your team is today and select the statement that best reflects your team's overall position honestly, not where you want them to be.

- Most of my team has not yet accepted that this change is happening.
- Most of my team understands the change is happening but is unsure what it means for them.
- Most of my team is starting to ask practical questions about how the work will change.
- Most of my team is ready to start working differently.

Use the option you chose above to identify what your team may be experiencing and what you, as a leader, should focus on next. Think of this as a starting point, not a final answer. A team that may have further to go towards acceptance needs more explanation and time. A team further along needs practical details and a chance to practice.

➤ **If you selected “My team has not yet accepted that this change is happening”:**

What your team is likely to be experiencing:

- They’ve heard about CWS-CARES, but it feels distant or abstract
- They may be skeptical because they’ve seen this initiative delayed before
- Early signs of avoidance or “wait and see” attitudes might be present

What you should focus on:

- Provide simple, repeated messages that confirm the change is happening
- Share clear timelines and what will happen next
- Avoid overwhelming people with details; the goal is awareness, not mastery
- Begin naming what will change and what will not change to reduce ambiguity

➤ **If you selected “My team understands the change is happening, but is unsure what it means for them”:**

What your team is likely to be experiencing:

- Curiosity mixed with worry about workload, expectations, or losing routines
- Questions focused on impacts on their workflow, approvals, timing, and skills
- Some emotional reactions include uncertainty, skepticism, or concern about readiness

What you should focus on:

- Explain the “why” behind CWS-CARES in simple, practical language
- Connect the change to familiar parts of their work so it feels less abstract
- Normalize questions and give permission to feel unsure
- Start sharing examples of what may look different once CWS-CARES begins

➤ **If you selected “My team is starting to ask practical questions about how the work will change”:**

What your team is likely to be experiencing:

- They’re mentally shifting into preparation mode
- People want specifics pertaining to workflows, documentation, case reviews, training dates

- You may begin hearing process-focused concerns (“How will X work in CWS-CARES?”)

What you should focus on:

- Provide practical details as you receive them, even if all answers aren’t final
- Bring their questions to the Implementation team or your OCM Coordinator
- Identify early adopters who can support peers throughout training
- Begin building readiness by reminding the team that learning will happen in stages

➤ **If you selected “My team is ready to start working differently”:**

What your team is likely to be experiencing:

- High engagement, curiosity, and openness to change
- They want hands-on opportunities, training, demos, and real scenarios
- They may start experimenting mentally with new workflows
- They want to share with others what they’ve learned within CWS-CARES

What you should focus on:

- Provide new opportunities to practice, even small ones like walking through mock scenarios
- Model the new behaviors you want to see (e.g., using CWS-CARES yourself)
- Reinforce progress regularly to maintain momentum
- Clarify what “working differently” looks like in day-to-day expectations
- Engage team members to share tips and tricks they’ve learned or to present a demo during a staff meeting

Focus on communication and awareness when your team is early in the change, shift to clarity and practical support as they move into the middle of the change and emphasize practice and confidence-building once they’re ready to move ahead.

2.2 Guide for Introducing the Change to Your Team

Whether this conversation takes place in a meeting, town hall, or casual discussion, use this guide to introduce the CWS-CARES transition in a way that creates clarity, invites questions, and sets the tone for ongoing dialogue with your team.

If you're met with negative feedback when introducing the change, review Section 3 of the Leadership Toolkit, "[Managing Resistance](#)."

Before the meeting

- Decide on one consistent explanation you will use
- Anticipate two or three questions you are likely to hear and prepare responses
- Block enough time for questions from your team, not just the announcement
- If your team is hybrid or remote, plan how you will create the same space for real questions virtually as you would in person

Opening the conversation

- State what is changing in one or two sentences
- Acknowledge that change takes adjustment
- Explain why it matters for the work the team does

During the conversation

- Create space for others to ask questions and offer answers rather than jumping in with all the answers yourself. Write down any concerns you cannot answer yet, and commit to a follow-up
- Avoid filling silence with reassurance you cannot back up
- Stay positive when faced with negative feedback
- Reassure the team
- Be honest – acknowledge challenges so the team feels heard, and reassure the team you're working through challenges together

Closing the conversation

- Summarize what was covered
- Confirm when you will talk about it next
- Thank the team for engaging

Section 3 – Leading Through the Transition to CWS-CARES

Your leadership becomes especially critical as your team begins moving from awareness into hands-on change. Preparing to lead means anticipating the questions, challenges, and uncertainties your team will face as they let go of old processes and begin working differently. During this phase, your role is to provide clarity, stability, and realistic expectations. You'll guide your team through the hardest part of the transition, when the old way is ending, the new way isn't yet comfortable, and people need reassurance and direction.

The tools here help you to identify early adopters who can support the transition, navigate tough conversations, and lead your team through the emotional and operational stages of change so they gain confidence in the new system.

3.1 Guide to Spotting Team Members Who Can Help Lead the Change

Change leaders share a few core habits: they empower others to help their peers, foster a learning environment, and highlight success stories. As a change leader, their role transforms from being the CWS-CARES answer-giver to being a learning partner by helping staff build confidence by navigating CWS-CARES and using approved resources.

To find a change leader, look for team members who:

- Listen intently and ask thoughtful questions rather than only raising concerns
- Are already respected informally by their peers
- Adapt quickly to new tools or processes
- Are willing to be visible during a period of uncertainty
- Foster a learning environment
- Celebrate wins and highlight success stories

Once identified:

- Give them early access to information
- Ask directly for their support, do not assume they will volunteer
- Check in with them privately, since being the visible early adopter carries its own pressure

3.2 Managing Resistance

Resistance is one of the most challenging aspects for leaders to deal with. Resistance is not necessarily negative. It can support strong and positive buy-in and commitment to the information or the new way of doing things.

Often, resistance is fueled by the “emotional” rather than the “rational” side of change. When staff process change in an emotional way, this type of processing may take on the form of:

- Fear of the unknown
- Sense of loss for “how things used to be”
- Needing to feel in control
- Feeling that changes aren’t fair
- Lack of trust in leadership
- Insecurity about succeeding in the new world
- Resentment about not being consulted

Change must be managed at the individual level because every person’s change journey happens at a different pace. The role you play as a leader is to ensure you’re meeting staff where they are on their journey to accept and support the change. An employee must start with understanding in order for him or her to get over the “resistance hump.” Once an employee understands the change and why it’s being made, they may be more inclined to support the change and help move their peers in the same direction.

Figure 1 compares how people move through the stages of Understanding, Ownership, Trust, Commitment, and Behavior in managed versus unmanaged change. In a managed change, the curve rises steadily, showing that clear communication and support help people build trust and commitment, leading to sustained behavior. In an unmanaged change, the curve peaks early and declines, illustrating how lack of guidance causes understanding and trust to fade, resulting in weaker commitment and inconsistent behavior.

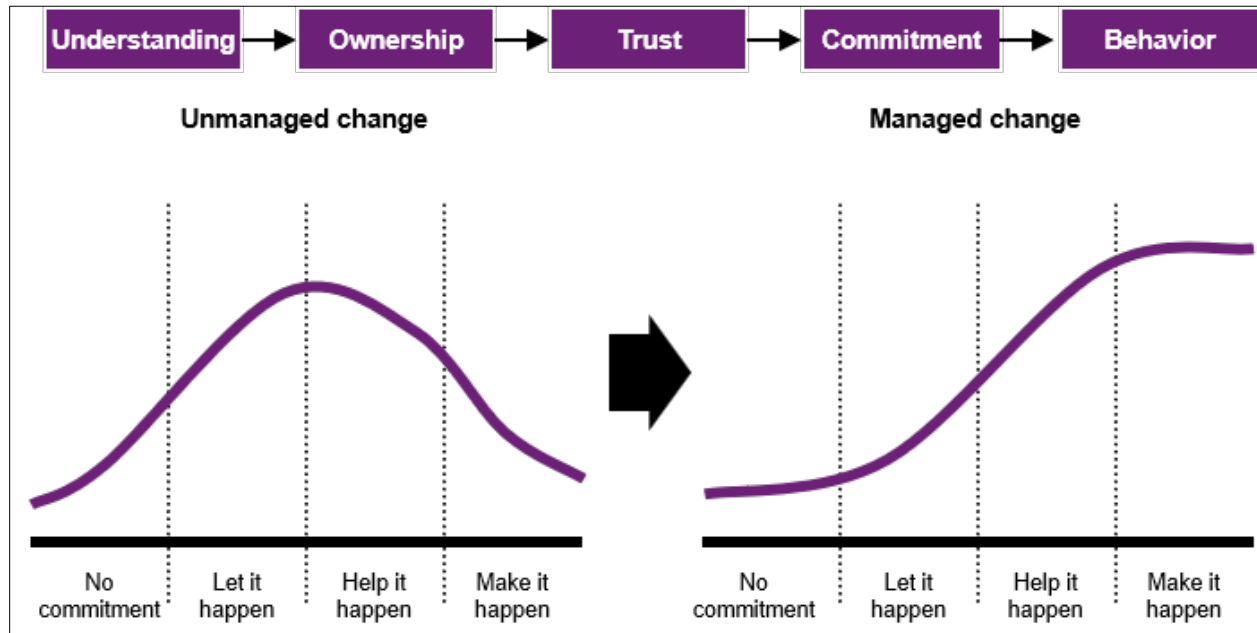


Figure 1 How People Typically Navigate Change

It's important to acknowledge that when people resist, they have good reasons, and you need to listen, explore the reasons, and address them. One of the best techniques to manage resistance is to “reframe” issues for staff.

Everyone's frame of reference comes from a set of values, feelings, knowledge, behavior, and beliefs based on events and experiences that happen to us. This frame of reference shapes our perceptions, actions, and expectations when business or personal change occurs.

In your conversations with staff, try using the reframing technique and follow the steps outlined in Figure 2.

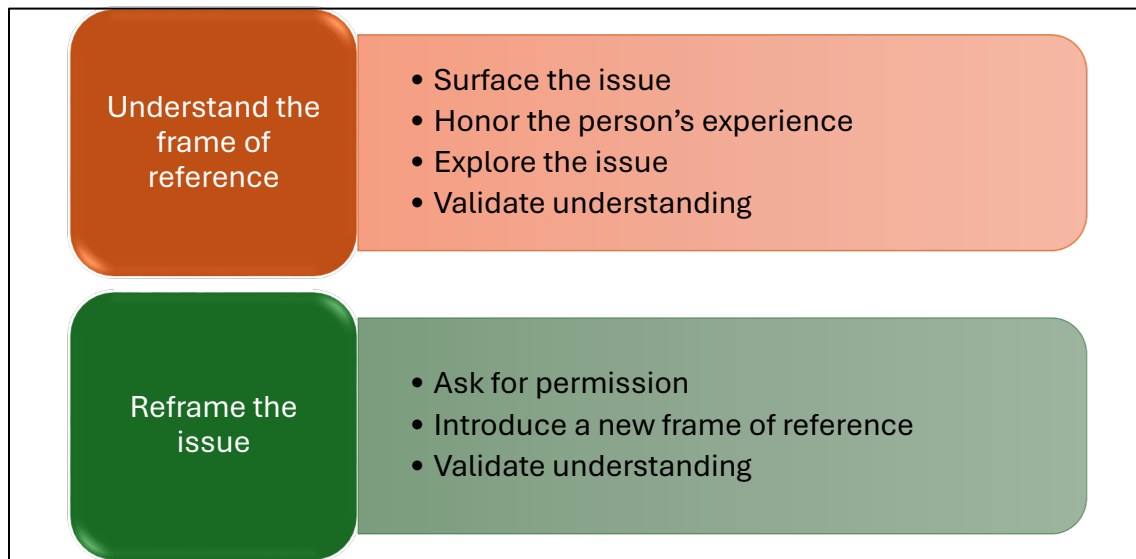


Figure 2 Steps to Reframe Conversations

Even if the employee's resistance continues, your effort to understand where they are coming from is a step in the right direction to move the needle on employee behavior change.

See the Managing Transitions Checklists in Sections [3.5](#), [3.6](#), and [3.7](#) for items to consider as you help staff navigate through the changes they face.

3.3 How to Have Difficult Conversations

As a change leader, you will encounter moments where staff express hesitation, frustration, or strong emotions about the transition to CWS-CARES. Difficult conversations are not a sign that the change is failing - they're a normal part of helping people let go of what's familiar and step into something new. Your ability to navigate these conversations with clarity, empathy, and steadiness directly shapes whether your team moves forward with confidence or becomes stuck in resistance.

The following are practical strategies tailored specifically to the CWS-CARES transition to help you navigate these conversations effectively.

1. Approach Conversations with Curiosity, Not Correction

Resistance often comes from emotional reactions such as fear of the unknown, loss of control, and worry about readiness. Begin by listening deeply rather than immediately correcting misinformation.

Use questions like:

- “Can you share more about what feels most uncertain right now?”
- “What part of the workflow is causing the most concern?”
- “What would help this to feel more manageable?”

This builds trust and helps you understand the person’s “frame of reference,” which is essential for reframing concerns.

2. Acknowledge the Loss Before Explaining the Gain

Before staff can adopt CWS-CARES, they must let go of long-standing habits and tools built over decades. Acknowledging that loss is one of the most powerful ways to diffuse resistance.

You might say:

- “I know you’ve built strong routines in CWS/CMS—letting go of those takes time.”
- “Your expertise in the current system is valuable, and we’re not discounting that.”
- “It makes sense that this feels like a big shift.”

When people feel seen, they become more open to hearing what comes next.

3. Reframe Concerns by Connecting Back to Purpose

After acknowledging emotions, gently reframe the conversation toward the purpose behind CWS-CARES.

Example reframes:

- “You’re right that learning a new system takes time. The benefit is that CWS-CARES reduces the switching between systems and helps you capture information more accurately so you’re not doing duplicative work.”
- “It’s true some screens will look different. Those changes are designed to reduce data hunting and make contact notes easier to find.”
- “Yes—this is a shift. But it’s a shift toward a system designed around how you actually work.”

4. Stick to the Three Core Questions When Conversations Get Stuck

You can use the following three grounding questions to return to when discussions become tense or emotional:

What is changing?

- CARES will replace our current system with one built around how caseworkers actually do their jobs, and it goes live in December 2026
- *Tip: avoid jargon and try to keep the statement to no more than one minute*

What will be actually different because of the change?

- There will be new tools for documentation and case tracking, with training and support built in every step
- *Tip: point staff towards resources for detailed explanations*

Who's going to lose what?

- Some processes will be identical to our existing system, some will look different, and some will not carry over to the new system
- *Tip: speak to people where they actually are in the change process rather than telling them where they ought to be*

5. Slow Down and Model Calm When Emotions Rise

Change leaders set the emotional tone. If a staff member becomes defensive, frustrated, or overwhelmed:

Try:

- “Let’s pause for a moment - this is a lot to take in.”
- “It’s okay to feel frustrated. Can you help me understand what part is hitting hardest?”
- “We can work through this together.”

Remaining calm and steady communicates safety, even when the content is difficult.

6. Guide the Search, Don’t Give the Answer

Take the following scenario for instance:

A staff member is learning an unfamiliar CWS-CARES workflow and asks the Super User to take over.

- Begin with: “Where would you look first?”
- Follow with: “What CWS-CARES resource might help?”
- Give the learner time to use an approved job aid, quick reference guide, Super User FAQ, known support path, or prior training example

- Step in only when needed to prevent unnecessary confusion or frustration, or when accuracy, confidentiality, safety, or required timelines are at risk

Ask these questions once emotions have settled and the employee is ready to problem-solve. They help shift the conversation from frustration to action:

- What are you trying to accomplish in CWS-CARES?
- Where in the workflow are you now?
- What have you already tried?
- Where would you look first?
- What CWS-CARES resource or job aid might help?
- What does the screen or message tell you?
- What will you try next while I observe?

3.4 Leading Through Transition

Adopting a new process is more than learning a new system; it's an emotional transition from one state to another that involves letting go of a familiar way of working. As a leader, your responsibility is to acknowledge the loss, support psychological realignment, and embrace a new way of working.

William Bridges, PhD, identified three phases—or zones—we move through as we navigate change: Endings, the Neutral Zone, and New Beginnings. Understanding the psychological impacts of change and helping people progress through the transition is essential for achieving successful and sustainable change.

Every individual moves through change on their own timeline, so no two transitions will look the same. Keep this framework in mind as you tailor conversations to each person's unique change journey.

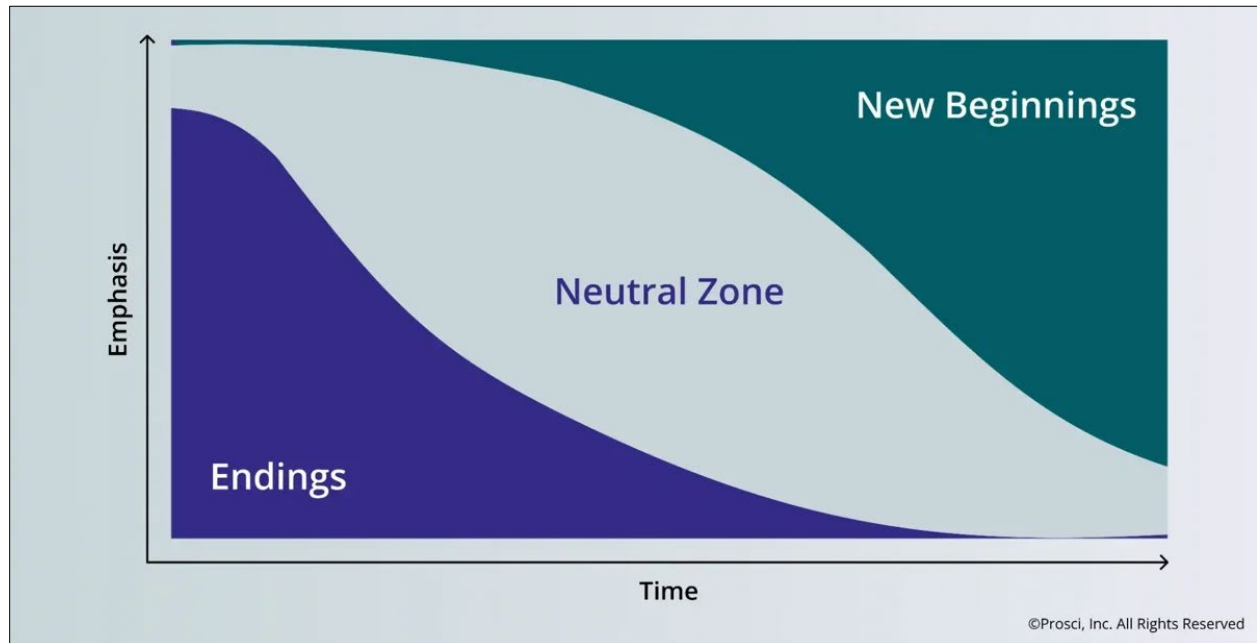


Figure 3 Prosci. (2025, August 20). *Bridges Transition Model Explained and Made Actionable*. Prosci.Com; Prosci Inc. <https://www.prosci.com/blog/bridges-transition-model>

The following checklists can help managers to help their staff more easily transition through phases.

3.5 Leading Through Ending, Losing and Letting Go

Before your team can adopt CWS-CARES, they need to let go of the old system and the routines and processes built around it. As a leader, acknowledging this loss can help to build trust amongst your team and recognize all the great work that was accomplished in the previous system.

Use the *Leading Through Ending, Losing and Letting Go* checklist (appendix C) to help frame your mindset around letting go so you can better guide your team through this transition phase:

- ☐ I have identified what my team is losing with this change, not just what they are gaining
- ☐ I understand how my team members feel about this change, even if I think their reaction is bigger than the situation calls for
- ☐ I have acknowledged their concerns without dismissing them

- ☐ I have given people room to express frustration or uncertainty
- ☐ I have been honest about my own adjustment to this change
- ☐ I am giving consistent, repeated information rather than a single announcement
- ☐ I have been clear about what is changing and what is staying the same
- ☐ I have found a way to acknowledge what worked well in the old system before moving on

3.6 Leading Through the Neutral Zone

This is the in-between period, after the old system is gone but before CWS-CARES feels comfortable. It is normal for this phase to feel unsettling or disorienting. During this phase, users are exploring new ways of working and are just starting to build confidence in the new system. Your role will be to help grow this confidence and support workers as they navigate through this uncertain phase.

Use the *Leading Through the Neutral Zone* checklist (Appendix C) to help guide your team through the uncertain period between letting go and new beginnings:

- ☐ I have set short-term, realistic goals for this in-between period
- ☐ I have created space for my team to ask questions without a complete answer always being ready
- ☐ I am checking in more frequently than usual, not less
- ☐ I am giving my team the resources and time they need to adjust
- ☐ I am treating early mistakes as part of learning, not failure
- ☐ I am involving my team in solving the practical problems that come up
- ☐ I am watching for signs that people feel unsupported or left to figure it out alone

3.7 Leading into the New Beginning

This is where your team moves from tolerating CWS-CARES to genuinely working within it. Confidence is high and workers are engaged with the system. They're comfortable in their new role and have learned from earlier mistakes. As a leader, take this time to recognize how far your team has come and continue to celebrate wins.

Use the *Leading into the New Beginning* checklist (Appendix C) to help reinforce positive change behaviors exhibited during this phase:

- ☐ I have clearly communicated why this change matters, not only what changed
- ☐ I am modeling the behavior and comfort with the new system that I am asking of my team
- ☐ I am recognizing people as they build competence and confidence
- ☐ I am building in small, visible wins so my team can see progress
- ☐ I am checking that our day-to-day processes and priorities now match the new way of working
- ☐ I have found ways to mark this as a real transition, not just an update

Section 4 – Sustaining the Change

Go-live is not the end of the transition; it's the beginning of a new way of working. Making the change stick requires ongoing leadership presence, reinforcement, and recognition long after the initial rollout. Your team will be building new habits, adjusting to new workflows, and figuring out what “normal” looks like in CWS-CARES. They will need your encouragement, consistency, and feedback to stay on track.

Use the resources in this part of the toolkit to help you sustain momentum, spot areas where additional support is needed, and celebrate early wins so your team continues to build confidence and mastery over the new system.

When does the change need to be sustained?

Sustaining the change is an ongoing process that begins after go-live. Mentoring and celebrating your team are practices that should be incorporated into any leadership style.

4.1 What Leaders Should Expect After Go-Live

Success with implementing CWS-CARES is not a single moment; it is a progression that builds over the months leading up to go-live and is sustained in the weeks that follow. At its core, success means that your team can open CWS-CARES on go-live day, complete their primary workflows, manage active cases without interruption, and continue doing so with increasing confidence through the post-launch period.

Part of that success means coaching team members to find the information they need rather than jumping in to complete the tasks. Each situation should be analyzed to determine when to direct, teach, and coach – letting team members build confidence by working independently rather than relying on leadership to provide specific instruction.

When to Direct, Teach, and Coach

As you guide your teams through the CWS-CARES transition, choosing the right level of support is essential. Depending on the situation and the staff member's readiness, you may need to direct, teach, or coach to ensure both effective learning and safe, compliant practice. The following guidance helps you to understand when each approach is most effective and how to use it with clarity and purpose.

- Direct:
 - Use this approach when there is risk to child safety, confidentiality, data integrity, compliance, or a time-sensitive case action

- Clearly state the required action, the applicable standard, and the escalation path—be specific and decisive so the staff member understands exactly what needs to happen and why
- Teach:
 - Use this approach when the staff member has not yet learned the CWS-CARES workflow or required practice.
 - Explain or demonstrate the steps once, then have the staff member perform them, referring them to available training materials and local procedures as needed
 - Reinforce learning by ensuring they can repeat the process independently and ask clarifying questions
- Coach:
 - Use this approach when the staff member has the necessary foundation and can locate or explain the next step.
 - Ask guiding questions, listen actively, point to resources, and keep the keyboard with the learner
 - Support them in building confidence and problem-solving skills without taking over the task.

The Leadership Trap

Leaders play a crucial role in helping staff build confidence with CWS-CARES, but certain habits can unintentionally get in the way. Be careful to avoid the leadership trap.

- Taking over in CWS-CARES may complete the task quickly, but it also removes a critical opportunity for the staff member to learn and build confidence
- You may be tempted to jump in because the workflow is new, time is short, or case documentation feels high stakes
- While the intent is to help, the hidden message can become: “I cannot use CWS-CARES without you”

Coaching builds staff proficiency, strengthens problem-solving skills, and supports accurate, confident child welfare practice while protecting accuracy.

4.2 The Impact of Celebrating Wins

It's important to celebrate as your team moves through milestones. Positive feedback can reinforce good habits, recognize progress, and acknowledge progress.

- The rationale behind recognizing wins:
 - Strengthens system confidence affirms that users can navigate CWS-CARES effectively on their own
 - Accelerates adoption: encouragement fosters consistent habits and quicker uptake of the system
- What to remember when celebrating wins:
 - Acknowledge when the team moves through milestones
 - Draw on recognition to strengthen culture and build trust
 - Keep celebrations inclusive and varied in form
 - Capture success stories and share them widely
 - Offer praise promptly and with genuine sincerity
 - Foster recognition that flows between peers
 - Treat it as an enduring practice rather than a one-time gesture
- How we celebrate wins
 - Public recognition: a sincere recognition during team or division meetings to celebrate when milestones are achieved
 - Team shoutouts: highlighting a team's win in a team communication email
 - A congratulatory message from leadership highlighting the achievement
 - A themed team huddle or "milestone moment" to acknowledge progress
 - Sharing a visual progress update (e.g., a milestone tracker or infographic) with the team
 - Feature the milestone in a newsletter or internal communication spotlight

Section 5 – Resources

You are not expected to navigate the transition alone. Effective change leadership depends on knowing where to turn, whether for answers, escalation pathways, technical guidance, or additional resources to support your team. This part of the toolkit ensures you have access to the people, materials, and communication channels designed to help you succeed throughout the CWS-CARES transition and beyond.

Use these supports whenever you need clarity, reinforcement, or connection to project partners who can help address issues, remove barriers, and keep your team moving forward.

5.1 Where can I go if I have questions or feedback?

- Your Organization's Implementation Coordinators can help route your questions and feedback to the CWS-CARES project team
- Visit the Child Welfare Digital Services website for a comprehensive set of FAQs about CWS-CARES V1: <https://cwds.ca.gov/faqs>
- Watch first video in the CWS-CARES Video Series: [Why CARES? A Case for Change](#)
- Visit the [CWS-CARES Production Simulation Hub](#) page for information about the production simulation environment
- You can find all CWS/CMS training related information in the [Training Portal](#)

5.2 Links to Additional Resources

- [CWS-CARES Communications Infographic](#) (2024): A resource detailing how Project communications are shared
- [CWS-CARES Overview Flyer](#) (Updated 2025): A two-page overview of CWS-CARES functionality
- [CWS-CARES System Modernization Infographic](#) (Updated 2025): Two-page infographic that outlines the benefits of migrating to a modern, cloud-based system
- [CWS-CARES User Resources Page Explore](#): Resources to learn about CWS-CARES
- [CWDS Meetings & Events Calendar](#): Captures recurring meetings hosted by the Project

- [CWS-CARES Frequently Asked Questions \(FAQs\)](#): Updated regularly with new questions and responses from the Project
- [Implementation Portal OCM Resources](#): This page provides a centralized location for all Organizational Change Management (OCM) tools, templates, and guidance supporting the CWS-CARES implementation

Conclusion

Thank you for leading this transition and for the commitment you bring to your teams every day. Your leadership is what transforms CWS-CARES from a new system into a new way of working, and your ability to communicate clearly, guide with empathy, and model confidence will shape how your organization experiences this change. As you move through the transition, remember that you are not doing this alone. The Project's Implementation OCM team is here to support you with tools, resources, and real-time guidance whenever you need it. If questions arise, if conversations become challenging, or if your team needs additional reinforcement, reach out through your OCM Coordinator or any of the support channels listed in this toolkit. Your partnership is essential to a successful launch, and we are here to walk with you every step of the way.

Appendix

Appendix A

Leadership Checklist

The Leadership Checklist provides a simple, practical way to stay focused on key actions to take before, during, and after go-live.

Before go-live

- ☐ I understand what is changing and why, well enough to explain it without notes
- ☐ I have reviewed the [CWS-CARES V1 project timeline](#) and know the key dates my team needs to hear about from me
- ☐ I have identified which team members may need extra support during the transition
- ☐ I have a consistent explanation ready that I can repeat the same way every time

Note: Review sections one and two of the Leadership Toolkit if unable to complete all items above

Week of go-live

- ☐ I am checking in with my team more often than usual, not less
- ☐ I am visible and available, not just sending written or email updates
- ☐ I am listening to concerns before they turn into resistance
- ☐ I am using the new system myself, not just describing it

Note: Review section three of the Leadership Toolkit if unable to complete all items above

After go-live

- ☐ I am still talking about the change, not treating it as finished
- ☐ I am recognizing effort and early wins, not only tracking metrics
- ☐ I am checking whether my team has what they need to succeed long term

Note: Review section four of the Leadership Toolkit if unable to complete all items above

Appendix B

Leadership Action Calendar

Weeks to Go - Live	Focus	Leadership Actions
<i>T - 11 weeks</i> <i>Week of 9/21</i>	▪ Communicate the Change ▪ Align and Re-connect ▪ Establish a Communications Rhythm	▪ Explain or reinforce “why” we are transitioning to CWS-CARES. Help staff keep the purpose and importance of CWS-CARES in the forefront of their thinking. ▪ Set expectations for the road ahead. Reinforce the December 7, 2026, Go-Live date and explain how the weeks before Go-Live will be used to prepare. ▪ Make CWS-CARES a regular topic in existing team meetings and huddles. Ask staff what they understand, what they are hearing, and what questions or concerns they have. Celebrate wins to recognize progress being made.
<i>T – 10 weeks</i> <i>Week of 9/28</i>	▪ Understand the Change ▪ Clarify Roles and Responsibilities ▪ Reinforce Project Information ▪ Surface Concerns	▪ Help to make the change relevant for your staff. Review change impacts affecting your team and translate them into what staff can expect in their day-to-day work. ▪ Guide staff not only on what they need to learn, do, or prepare before Go Live, but also on how and when they will do it. This includes setting clear expectations, providing structured time for learning and practice, and giving staff regular opportunities, such as weekly or daily sessions, to practice in the Production Simulation environment. ▪ Share information from trusted project sources and clarify what is known versus still being determined. ▪ Share recurring questions, identified resistance, or readiness concerns with your OCM Coordinator, Implementation Coordinator, SPOC, or other appropriate project contact. Submit your recurrent inquiries to the Inquiry Response Team, so it can be raised for broader project awareness.

Weeks to Go - Live	Focus	Leadership Actions
<i>T – 8 Weeks</i> <i>Week of 10/12</i>	- Encourage Hands on Practice - Connect Learning to Work - Identify Confidence Gaps	- Ask staff to continue practicing workflows most relevant to their roles in the Production Simulation environment. Ensure staff are aware of self-guided CWS-CARES training resources including, Quick Reference Guides, Training Guides, and videos. Also encourage staff to take advantage of in-app Enablements to assist them in getting more comfortable with CWS-CARES. - Discuss what staff are learning and how it applies to their current work responsibilities. - Ask staff which tasks or processes they feel prepared for and where they need more practice or support.
<i>T – 6 Weeks</i> <i>Week of 10/26</i>	- Pulse Check Your Team - Evaluate Beyond Training - Escalate Risks	- Query your team using some questions like: What do you feel prepared for? Where are we still uncertain? What could/is preventing us from being ready? - Don't just look at training completion statistics as an indicator of readiness. Consider other factors like employee confidence, understanding, access/permissions granted in CWS-CARES, and degree of impact from process changes. - Raise issues that cannot be resolved locally through established project channels.
<i>T – 4 Weeks</i> <i>Week of 11/9</i>	- Prepare for the New Normal - Know How Work Will Get Done - Know the Support Model	- Set realistic expectations and talk openly about the learning curve. Discuss the adjustment period that will accompany Go-Live. - Review operational priorities, staffing coverage considerations, critical workflows, and applicable local procedures to support a smooth cutover period and Go-Live. - Ensure staff know where to go for support including who their Super Users are, where to find resources, how to request help, and how issues will be escalated. Affirm to staff that they are not expected to know all the

Weeks to Go - Live	Focus	Leadership Actions
		answers but are expected to know how to access support.
<i>T – 2 Weeks</i> <i>Week of 11/23</i>	▪ Build Confidence ▪ Pulse Check Your Team ▪ Reinforce Key Messaging ▪ Recognize the Work	▪ Follow-up on outstanding training, access, process support, or operational concerns. ▪ Ask staff what could still prevent them from being successful on Day 1. ▪ Focus on what staff need to know and do during the system cutover before Go-Live and what they need to do during Go-Live rather than introducing unnecessary new information. ▪ Recognize the preparation staff have completed and reinforce that support will continue after Go-Live.
<i>T- 0</i> <i>Go-Live on 12/7</i>	▪ Be Visible and Accessible ▪ Promote Available Support ▪ Listen for Patterns ▪ Recognize Progress	▪ Proactively check-in with staff rather than waiting for issues to reach you. Designate a secondary point of contact that is available to support staff if you are not available. ▪ Reinforce support channels and direct staff to established resources. Discourage unsupported workarounds. ▪ Identify recurring questions, barriers, or operational impacts and escalate them quickly to your designated OCM Coordinator, Implementation Coordinator, or SPOC. ▪ Submit your recurrent inquiries to the Inquiry Response Team, so it can be raised for broader project awareness. Celebrate early wins and acknowledge staff who are helping others adapt.

Appendix C

Leading Through Transitions

Adopting a new process is more than learning a new system; it's an emotional transition from one state to another that involves letting go of a familiar way of working. As a leader, your responsibility is to acknowledge the loss, support psychological realignment, and embrace a new way of working.

William Bridges, PhD, identified three phases—or zones—we move through as we navigate change: Endings, the Neutral Zone, and New Beginnings. Understanding the psychological impacts of change and helping people progress through the transition is essential for achieving successful and sustainable change.

Leading Through Ending, Losing and Letting Go

The first phase of transition is the “Ending” and describes the emotional and psychological process that occurs when people must leave behind the old before they can embrace the new.

Use this checklist to help frame your mindset around letting go so you can better guide your team through this transition phase.

- ☐ I have identified what my team is losing with this change, not just what they are gaining
- ☐ I understand how my team members feel about this change, even if I think their reaction is bigger than the situation calls for
- ☐ I have acknowledged their concerns without dismissing them
- ☐ I have given people room to express frustration or uncertainty
- ☐ I have been honest about my own adjustment to this change
- ☐ I am giving consistent, repeated information rather than a single announcement
- ☐ I have been clear about what is changing and what is staying the same
- ☐ I have found a way to acknowledge what worked well in the old system before moving on

Leading Through the Neutral Zone

The “Neutral Zone” is the second phase of transition and describes the in-between period between the old system and the new.

Use this checklist to help guide your team through the uncertain period between letting go and new beginnings.

- ☐ I have set short-term, realistic goals for this in-between period
- ☐ I have created space for my team to ask questions without a complete answer always being ready
- ☐ I am checking in more frequently than usual, not less
- ☐ I am giving my team the resources and time they need to adjust
- ☐ I am treating early mistakes as part of learning, not failure
- ☐ I am involving my team in solving the practical problems that come up
- ☐ I am watching for signs that people feel unsupported or left to figure it out alone

Leading into the New Beginning

The “New Beginning” phase is the final stage of transition where users should model new behavior and fully adopt new processes.

Use this checklist to help reinforce positive change behaviors exhibited during this phase.

- ☐ I have clearly communicated why this change matters, not only what changed
- ☐ I am modeling the behavior and comfort with the new system that I am asking of my team
- ☐ I am recognizing people as they build competence and confidence
- ☐ I am building in small, visible wins so my team can see progress
- ☐ I am checking that our day-to-day processes and priorities now match the new way of working
- ☐ I have found ways to mark this as a real transition, not just an update