



Milestone Management: Process Changes for Success

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Does this sound like you?

Are you in demand?

Are your caseloads overflowing?

It is hard to tell what your priorities should be?

Is it hard to define and quantify systematic obstacles?

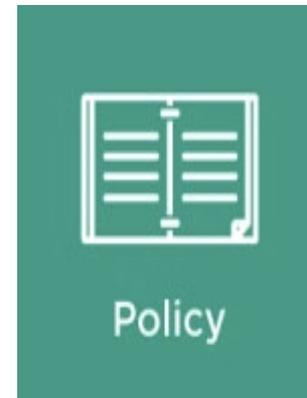
Milestone Management

PROJECT

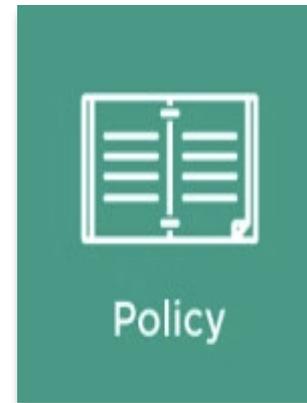
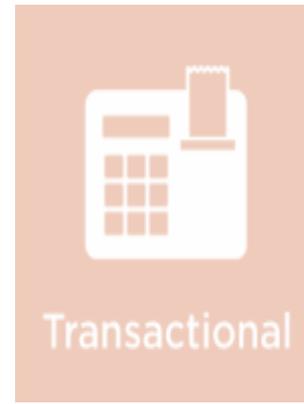
MILESTONES

ACTIVITIES

Types of Government Work



Types of Government Work



With competing projects...

- Which one should I work on right now?
- What should I work on next?
- Which projects are progressing? Which are not?
- Why are some projects not progressing?
- Is something hindering multiple projects from progressing?
- Do I have too many projects?
- As a supervisor, which projects need my support most?
- How does progress compare across project managers?

Milestone Management

- Project
 - Milestone
 - Activity
 - Target Start Date / Actual Start Date
 - Target End Date / Actual End Date
 - Status
 - Not started
 - In Progress
 - Stuck, because...
 - Complete

What is the Milestone Management project?

- A multi state agency project spearheaded by the Governor's Office of Management and Budget (GOMB), which focuses on:

The right services being provided in the right amount and at the right time... to achieve offender success

The social services blueprint
solution for milestone
management was developed
with Utah state agencies



utah department of
human services



Milestone Management Synchronization



Family Employment Program
Vocational Rehabilitation

The Why for Corrections

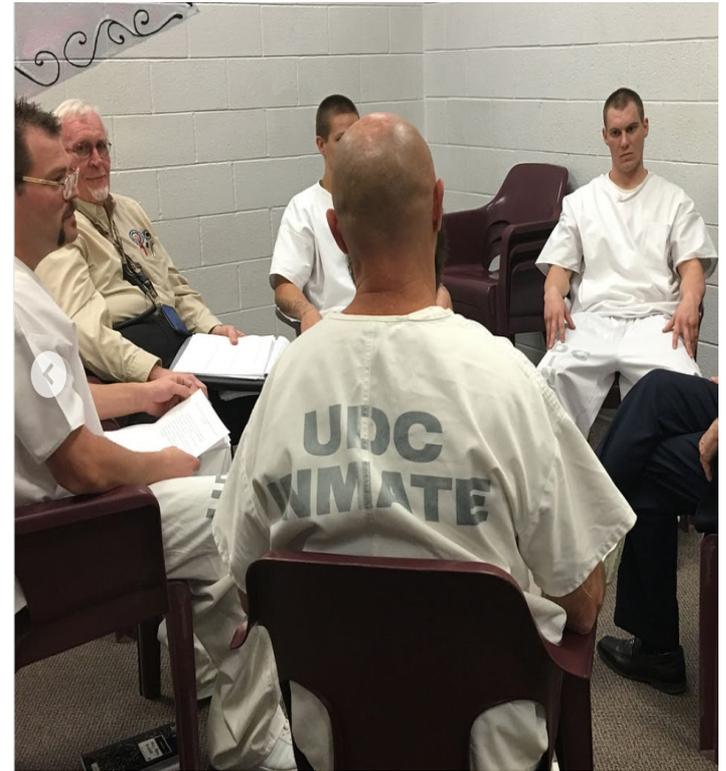
Recidivism is reduced and public safety increased by addressing:

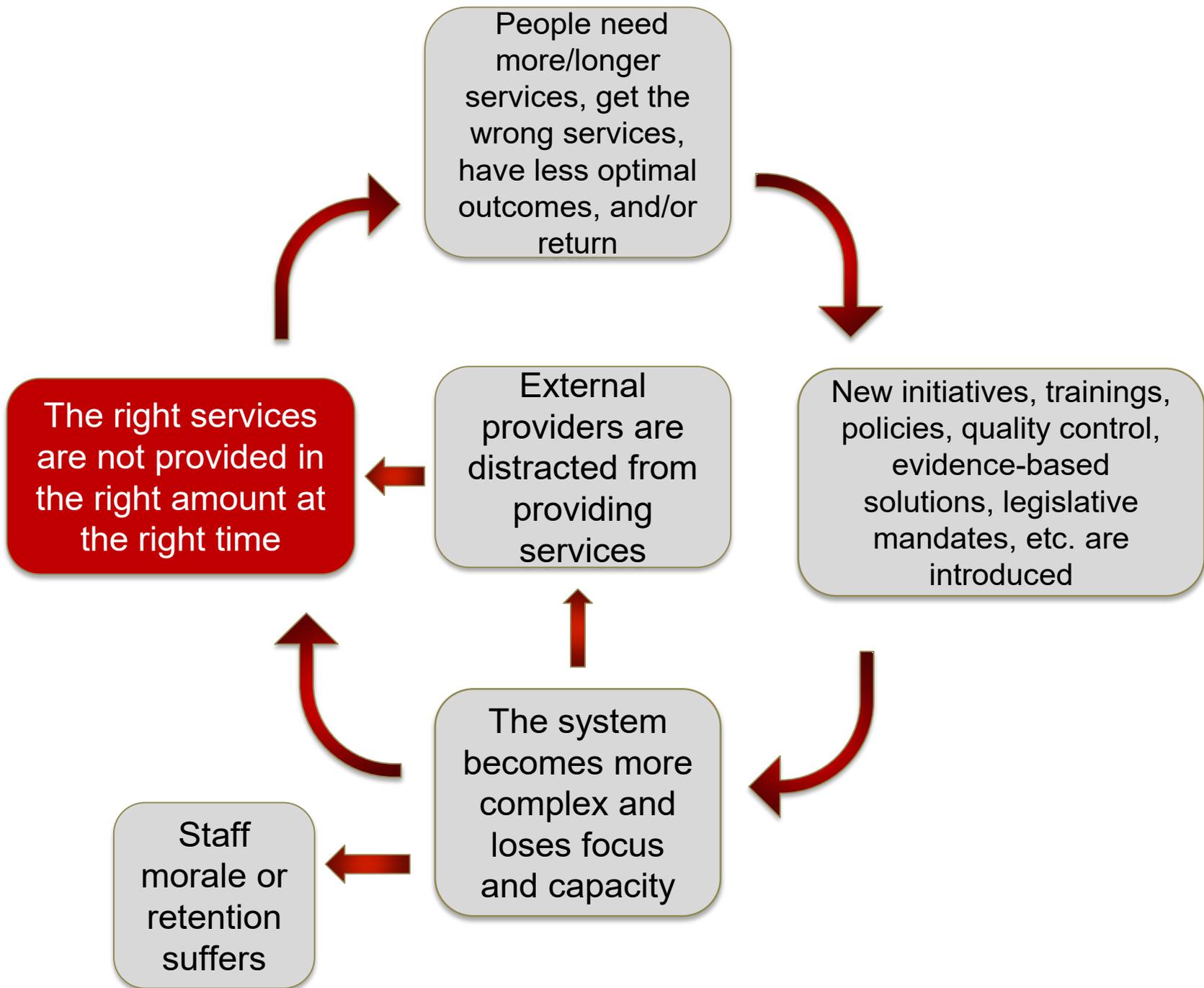
Right behavior driver

With the right intervention

At the right time

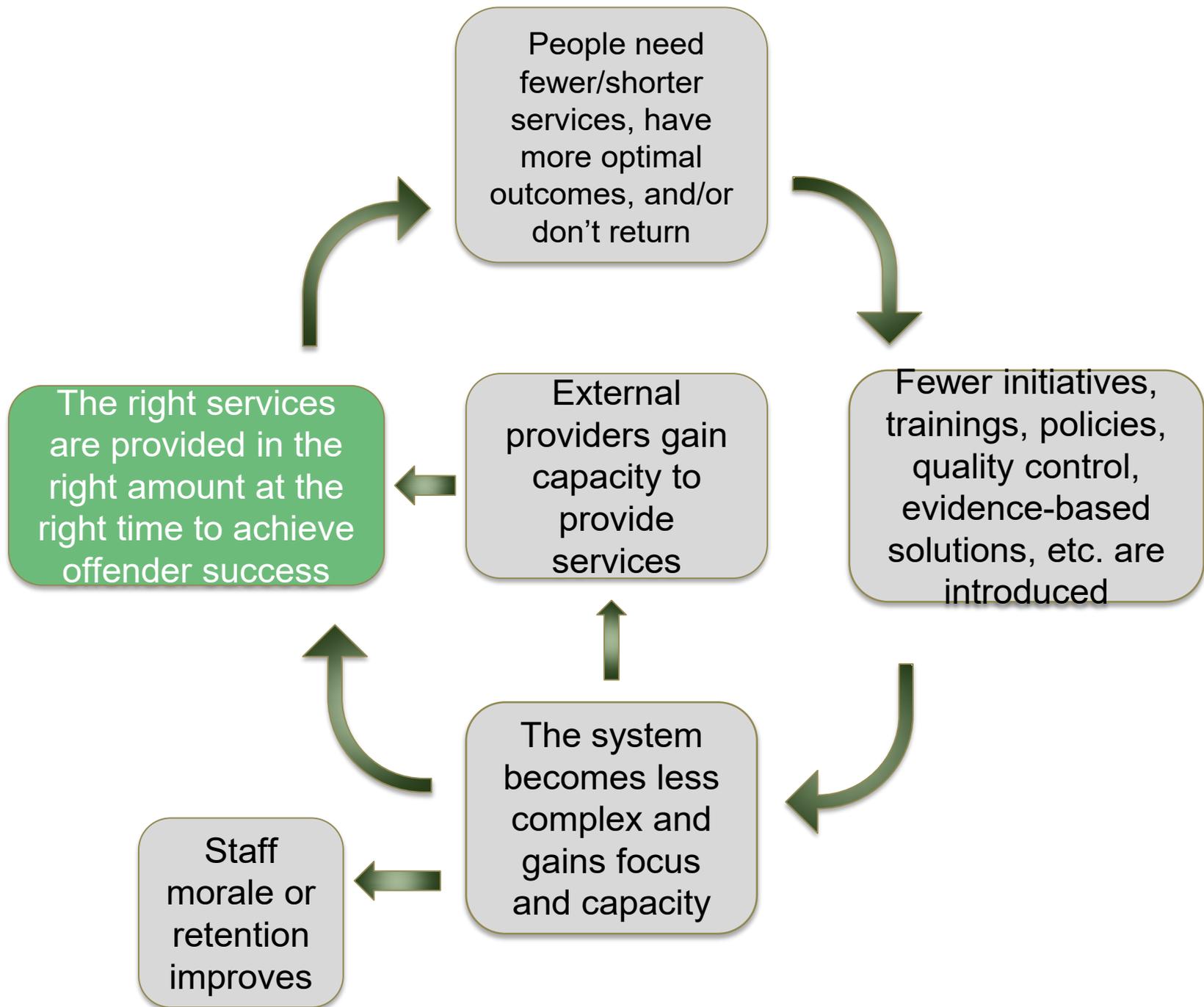
The Case Action Plan (CAP) is crucial for prioritizing services to offenders





Direction of Solution

The right services are provided in the right amount and at the right time... to achieve offender success



Case Action Plan Milestone Management

Goal

MILESTONES

ACTIVITIES

Milestone Management and CAPS

- CAP Goal
 - Milestone
 - Activity
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 - Target End Date / Actual End Date
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Current CAP Challenges

- Goals in database were not consistent with the domains from our risk assessment creating some confusion
- Only two levels in the CAP, goals and action steps
- Action steps combined activities and events
- Target start date was missing
- Lacking a CAP progress indicator
- No caseload CAP snapshot

Current CAP Challenges Cont.

- Gathering CAP information required exploring each individual goal and action step
- Successful completion and progress of activities were not tracked
- No clear path to identify stalled activities and the accompanying reason
- Lacking ability for supervisors to identify needs of case managers or lack of resources

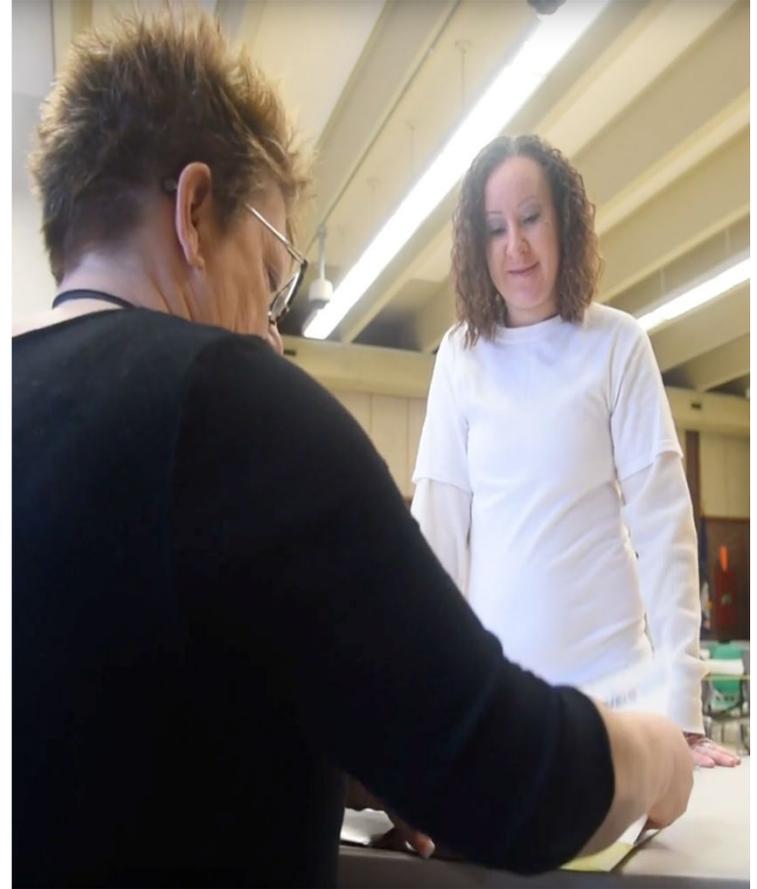
Current CAP Challenges

Cont.

- Inmates are assigned to a case manager based off body location, no consistency
- Case managers required to perform duties not directly related to case management
- Security core staffing by case managers
- Misunderstanding of CAP purpose and what should be in a CAP

Technology and Business Changes

- Technology is a tool, not the solution
- O-Track improvements are integral to this project
- Success will be minimal without adhering to new process changes
- Lasting impact require business process changes
- Understanding the “why” is crucial



Business Process Changes



- Consistent caseloads for case managers
- Eliminating core staffing for case managers
- Training staff to focus CAPs on the driver of criminal behavior not just programs
- Including individual barriers as part of the CAP
- Using stuck reasons to address roadblocks
- Rewording database to match risk areas, separating milestones and activities

Business Process Changes Cont.

- We are pursuing a philosophical shift as a department – CAPs are becoming the focal point of Case Management
 - Activities subordinate to CAPs
 - Inmate movement driven by CAPs
 - Consistent caseloads department wide
 - CAPs focused on criminogenic drivers and responsivity issues
 - Emphasis on CAP progress
 - Increased information to BOPP on CAP status

Technology Changes

- Tables in the database
- Replaced action steps with milestones and activities
- Included target start dates and specified target end dates
- Created a CAP tracker function
- Added Offender CAP Overview screen
- Stalled status – with reason

Activity Detail ✕

ALCOHOL/DRUG PROBLEMS Goal > APPROVED TREATMENT PROGRAM Milestone > Activity

Title: Custom Activity **Name:** APPROVED TREATMENT PROGRAM

Description: CONVERTED_2019-09-02 100% participation and engagement in approved treatment program. Report to P.O. monthly and a significant other weekly of progress and of techniques learned. Comply with all requirements and assignments of treatment including

Target Start Date: 12/04/2018 **Target End Date:**

Actual Start Date: 12/04/2018 **Actual End Date:**

Status: IN PROGRESS

Is this activity stuck? **Stuck Reason:** CRIMINOGENIC BEHAVIOR

Stuck Reason Comment: Offender had been removed from the program for 30 days, can return after review.

Exit Type: ...

Comment:

* There is/are 0 comment(s)

[Add/View Comments](#)

Updated By: dfrankli 09/23/2019

Source File: w_otr_s50_2_activity.html

[Reset](#) [Save](#) [Cancel](#)

Why CAPs

- Assessment-driven case management matches individuals with appropriate programs, interventions, and services, addresses criminogenic risk factors, and remove barriers to successful intervention
- Recidivism is reduced and public safety increased by addressing:
 - Right behavior driver
 - With the right intervention
 - At the right time

O-Track Upgrades

- October 15, 2019 the first phase of changes
 - Additional phases will roll out over the next year+
- Changes are minimal to meet the aggressive roll out date
- New screens have been added to assist with CAP monitoring and status tracking

CAP Tracker /Offender CAP Overview

- Two new screens that have been added
- Designed to assist staff in case management
- CAP Tracker displays all of the active milestones for the offenders on an agents case load
- Milestone status is displayed with colors
- Offender CAP Overview provides a snapshot of all active milestones and activities for an offender

CAP Tracker Listing

Milestone List

Keyword Search:

	Offender #	Offender Name	Body Location	Milestone Name	Status or Progress Color	Risk/Needs Area	Risk Need Level
<input type="radio"/>	206746	ROBLES, JESSY ANTHONY	CUCF FIR	CUSTOM CRIMINAL HISTORY	IN PROGRESS	CRIMINAL HISTORY	VERY HIGH
<input type="radio"/>	128990	TANGNEY, JOHN FAY	FARMINGTON AP&P	COMPLETE CONQUEST	IN PROGRESS	ALCOHOL/DRUG PROBLEMS	HIGH
<input checked="" type="radio"/>	206746	ROBLES, JESSY ANTHONY	CUCF FIR	APPROVED TREATMENT PROGRAM	IN PROGRESS	ALCOHOL/DRUG PROBLEMS	MEDIUM
<input type="radio"/>	167953	WOODMANSEE, DAVID CARLIN	FARMINGTON AP&P	COMPLETE RESIDENTIAL PROGRAM	IN PROGRESS	ALCOHOL/DRUG PROBLEMS	LOW
<input type="radio"/>	85874	BERRETT, JOHN	FORTITUDE TC	CUSTOM MENTAL HEALTH	IN PROGRESS	MENTAL HEALTH	
<input type="radio"/>	85874	BERRETT, JOHN	FORTITUDE TC	CUSTOM ACCOMMODATION	IN PROGRESS	ACCOMMODATION/HOUSING SAFETY	
<input type="radio"/>	175694	MONTES, ANTHONY LEO JR	FUGITIVE REG 1	CUSTOM COMPANIONS	IN PROGRESS	COMPANIONS	VERY HIGH
<input type="radio"/>	206746	ROBLES, JESSY ANTHONY	CUCF FIR	CUSTOM COMPANIONS	IN PROGRESS	COMPANIONS	VERY HIGH
<input type="radio"/>	29591	BELT, DWAYNE ROLAND	FORTITUDE TC	CUSTOM EMPLOYMENT	IN PROGRESS	EMPLOYMENT	HIGH
<input type="radio"/>	29591	BELT, DWAYNE ROLAND	FORTITUDE TC	CUSTOM EMPLOYMENT	IN PROGRESS	EMPLOYMENT	HIGH
<input type="radio"/>	29591	BELT, DWAYNE ROLAND	FORTITUDE TC	CUSTOM CRIMINAL HISTORY	IN PROGRESS	CRIMINAL HISTORY	HIGH
<input type="radio"/>	137235	GILLEY, JEREMY EUGENE	FARMINGTON AP&P	COMPLETE RESIDENTIAL PROGRAM	IN PROGRESS	ALCOHOL/DRUG PROBLEMS	HIGH

Showing 1 to 48 of 48 entries

Activity List

Keyword Search:

	Activity Name	Status or Progress Color / Exit Type	Reason Code	Stuck Notes	Target Start	Actual Start	Target End	Actual End
<input type="radio"/>	APPROVED TREATMENT PROGRAM	IN PROGRESS	CRIMINOGENIC BEHAVIOR	Offender had been removed from the program for 30 days, can return after review.	12/04/2018	12/04/2018		

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[Offender CAP Overview](#)

Questions

