

Workload Management

Regional Connects

March 2026

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CalSAWS



Historical Context for Workload Management

2024 Efforts to Identify & Establish Requirements with County Input

ACTIVITIES

Research, Analysis and Requirements Gathering

Regional Workshops
Workgroup
County Site Visits
Regional Manager Touchpoints

Recruited workgroup participants from each region through CRFI 23-128

Met with Regional Managers prior to each regional workshop to research key county concerns

COUNTY PARTICIPATION

REPRESENTATION

44

Counties

6

Regions

REGIONAL WORKSHOPS

6

4-hr Sessions

122

Total Participants

10-40

Participants ea. Session

SITE VISITS

7

Counties:

Stanislaus
Merced
San Bernadino

Imperial
Sacramento
Riverside
Santa Clara

OUTCOMES

Requirements for Workload Management

Appointment Scheduling & Workload Assignment

Maintain Worker Availability/Schedules

Appointment Reassignment

Appointment & Workload View

Application Prioritization

Reports

Training & Change Management

Historical Context for Workload Management

2025 Efforts to Validate Requirements & Establish Design with County Input

ACTIVITIES

Research, Analysis and Requirements Gathering

Workgroup Meetings
Collaborative Design Discussions
Review and Feedback Incorporation
Finalization & Sign-Off

Recruited workgroup participants from each region through
CRFI 25-021

COUNTY PARTICIPATION

REPRESENTATION

16

Counties

6

Regions

WORKGROUP SESSIONS

25

2-hr Sessions

6

Month Span

18

Total Participants

REQUIREMENTS

150+

Addressed from
the 2024
Workgroup

OUTCOMES

Design for Four SCRs Covering Phase 1-2 Covering:

User-Facing Functionalities
Configurations
Batches/Interfaces
Reports

Functionality Areas

Homepage / Main Landing Page
Appointment Management
Workload Management
Schedule Management
Administrative Configuration

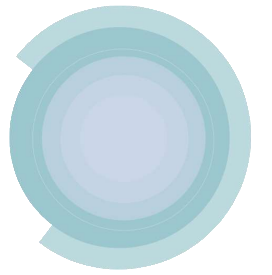
County Administration Highlights

Caseload Capacity
Configuration

Schedule
Configuration

Workload Management at a Glance

Upcoming CalSAWS Workload Management enhancements will improve how workers manage schedules and book customer appointments.



PHASE 1



Appointment Management



Schedule Management



Workload Management



Overall Management



Admin Configuration



Release 26.05

PHASE 2



Workload Prioritization



Appointment Tasks



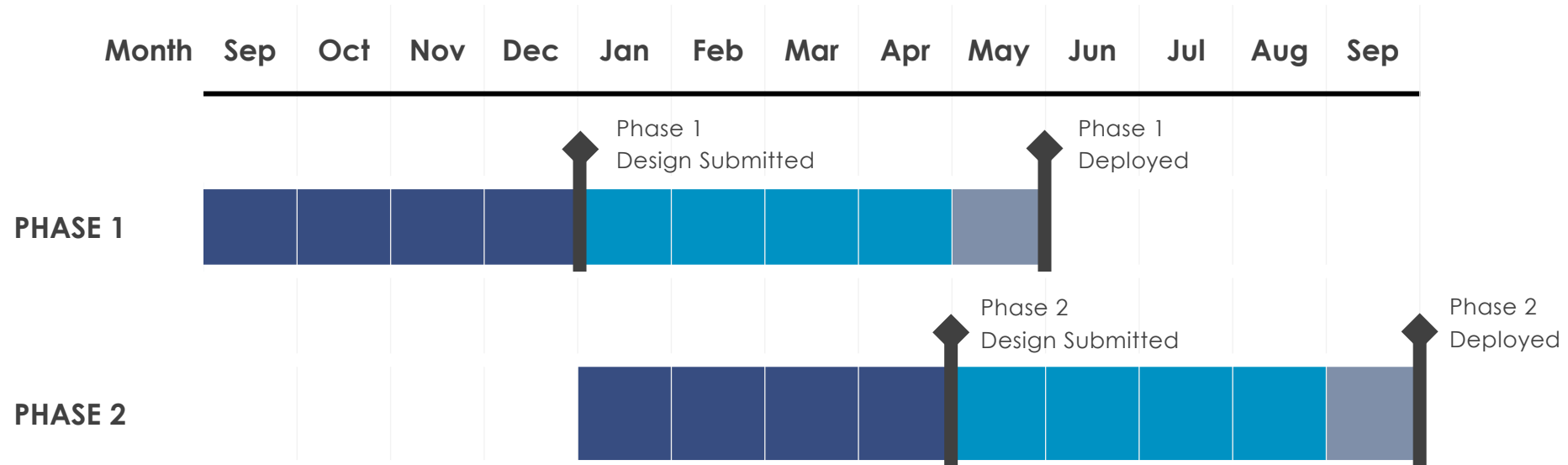
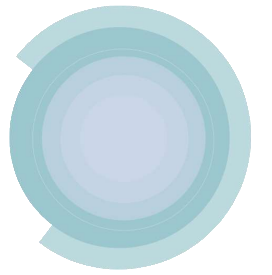
Reports



Release 26.09

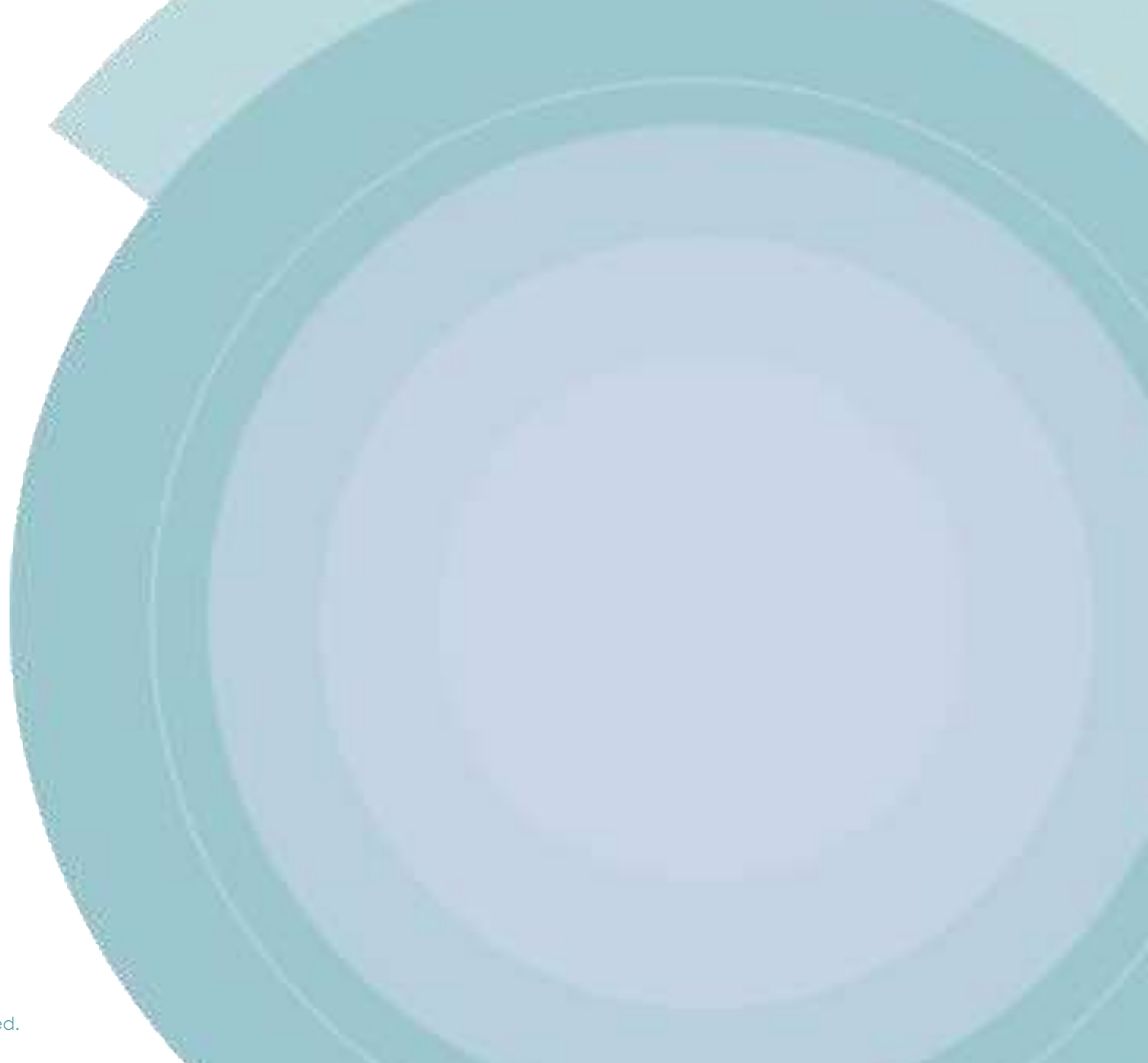
Project Milestones Roadmap

Workload Management Phase 1 & 2



■ Design ■ Develop ■ Test ◆ Milestone

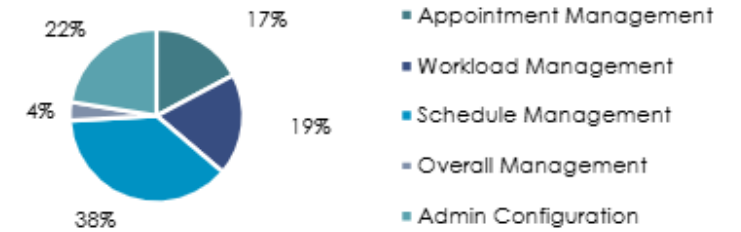
Workload Management System Breakdown



Workload Management Phase 1 | Impacts Dashboard

The Workload Management system will undergo updates aimed at enhancing features & capabilities for a user-centric design. These updates will add and improve functionality for how users manage schedules, manage workload, and maintain appointments with customers.

Change Impacts by Functional Area

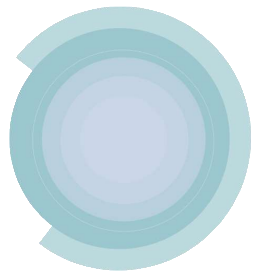


OVERVIEW OF IMPACTED FUNCTIONAL AREAS

FUNCTIONAL AREA	PAIN POINTS	CURRENT STATE	FUTURE STATE
APPOINTMENT MANAGEMENT	Limited system support for assisted scheduling and reassignment; more reliance on manual steps/visibility gaps.	Staff use the homepage to view schedules and manage appointments/assignments, including manual creation and single-worker search.	Streamlined scheduling with guided assistance, improved history tracking, and expanded reassignment capabilities to speed appointment handling.
WORKLOAD MANAGEMENT	Workload reassignment and pending work allocation are more manual and/or harder to find and manage quickly.	Staff use existing list pages to view and reassign in-progress workload and confirm case and program assignments, while counties can download templates and upload documents to the system (not specifically for workload management).	Adds capacity-based reassignment, improved automated recurrence, and better visibility with expanded tools for assignment support, reassignment search/details, and pending workload tracking.
SCHEDULE MANAGEMENT	Schedule building, visibility, and maintenance are constrained (limited views and more fragmented actions).	Staff can search schedules by worker ID and view office/unit schedules, weekly schedules, and availability to support workload management; counties can download templates and upload documents to the system.	Improves schedule views and filters, adds availability controls, updates access rights, and expands scheduling with new availability and template pages, schedule uploads, and enhanced search features.
OVERALL MANAGEMENT	Users spend more time navigating across areas to find what matters for their day.	CalSAWS has a Homepage, but it lacks a streamlined "next 7 days" view (appointments, assignments, due/overdue tasks, and critical e-Messages) and routes "My Schedule" date links to the Daily Schedule page.	Adds a new My Work page and refreshed Homepage to quickly orient users and streamline daily work.
ADMIN MANAGEMENT	Caseload configuration is limited and worker level capacity configuration does not exist today.	Staff can manage and view role specific worker data, but counties must standardize an automation duration, work with preset schedule categories, face limited or no supervisor authorizations, and cannot export reassignment data for reporting.	New admin capabilities for caseload capacity configuration (including worker-level capacity), enabling more consistent setup and governance.

Appointment Management

Appointment Scheduling | Future State Example: Users can now see worker schedules when scheduling an appointment via the new Scheduling Assistant page. This reduces scheduling conflicting appointments and the workload of reassigning appointments to available workers.



CURRENT STATE

Dates

Begin Date: 03/17/2026
Begin Time: 2:00 PM
Appointment Duration: 30 minutes

System Suggested Time(s):

- 03/17/2026 from 2:00 PM to 2:30 PM
- 03/17/2026 from 2:15 PM to 2:45 PM
- 03/17/2026 from 2:30 PM to 3:00 PM
- 03/17/2026 from 3:45 PM to 4:15 PM
- 03/17/2026 from 4:00 PM to 4:30 PM
- 03/17/2026 from 4:15 PM to 4:45 PM
- 03/17/2026 from 4:30 PM to 5:00 PM

Suggest Time(s)

Limited suggested times provided. No functionality to search across multiple workers to choose the best fit.

FUTURE STATE

Scheduling Assistant

Indicates required fields

Follow Your Search

Filter By: (Available)

Region: State: Office: CREDIT PROJECT OFFICE: Review

Program: AAP Language: English Priority: High Appointment Category: Telephone Interview Flexible Desk Appointment

Date: 03/17/2026 Major Area: Job Title: Duration: 30 minutes

Search Results Summary Results: 1 - 25 of 129

Worker ID	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM
W0A0000010												
W0A0000020												
W0A0000030												
W0A0000040												
W0A0000050												
W0A0000060												
W0A0000070												
W0A0000080												
W0A0000090												
W0A0000100												
W0A0000110												
W0A0000120												
W0A0000130												
W0A0000140												
W0A0000150												
W0A0000160												
W0A0000170												
W0A0000180												
W0A0000190												
W0A0000200												
W0A0000210												
W0A0000220												
W0A0000230												
W0A0000240												
W0A0000250												

Appointment Information

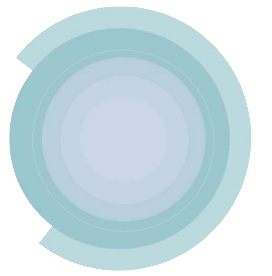
Appointment Date: 06/01/2025 Appointment Begin Time: Appointment Duration: 30 minutes Flexible End Time:

Search for workers based on criteria relevant to the appointment

View worker schedules when selecting an appointment time

Appointment Management

Appointment Reassignment | Future State Example: Users can now reassign appointments from one worker to another in bulk. This reduces the workload on users moving appointments to available workers by automating it providing functionality to do multiple appointments at once.



CURRENT STATE

Customer Appointment Detail

Indicates required fields

Edit Attendance Reschedule **Edit** Close

Attendees

Customers	Attendance
Smith, Joe 35M	Shown
Smith, Jane 35F	Shown

General Information

Case Number: 4325671

Category: Counselor Meeting

Status: Completed

Initiate Call: Worker

Phone Number: (555)555-5555

Office: CalSAWS Project Office

Location: 123 MAIN ST, NORWALK, CA 90650

Appointment Letter Comments: Appointment Comments:

Program Information

CalFresh CalWORKs
GA/GR GAGR ES/GROW
Medi-Cal WTW/REP
Other

Schedule Appointment

Date: 09/17/2025 Begin Time: 10:00 AM Duration: 30 minutes Flexible End Time: 12:00 PM

Workers: 36LSAOWQ0C, 36LSO4KM0D

Status History

Edit Attendance Reschedule Edit Close

Only can reassign appointments one at a time

FUTURE STATE

Appointment Reassignment Detail

Indicates required fields

Save and Return Cancel

Title: Appointment Reassignment Status: John

Scheduled By: Ralphe Dennis Last Run Date: 10/10/2025

Appointment Source(s)

Level	Number	Name
Office	00	CalSAWS Project Office
Unit	9100	Barbara ESP-EE Admin
Worker	36LSO4KM0D	Makenna Johnson

Appointment Destination(s)

Level	Number	Name
Case	1234567	Case Name

Reassignment Options

Appointment Category: (Special Appointment) Appointment Type: (Special Meeting) Flexible Block Appointment: 0/1/2/3

Appointment Status: (Scheduled) Language: (English)

Reassign All Appointments Scheduled within the Next: (2) items

Programs

CalFresh CalWORKS
GA/GR GAGR ES/GROW
Medi-Cal WTW/REP
Other

Appointment Destination(s)

Level	Number	Name
Office	00	CalSAWS Project Office

Recurrence

Frequency: (Every Other Week) Begin Date: (9/16/2025) End Date: (9/30/2025)

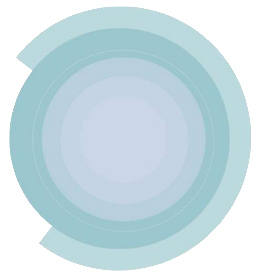
Workday(s): (Monday) (Tuesday) (Wednesday) (Thursday) (Friday)

Reassign Appointments in Bulk

Set rules for these to run on a recurring basis

Schedule Management

Maintain Worker Schedule | Future State Example: Users can now update worker schedules and add multiple schedule categories at once instead of adding a schedule category one at a time.



CURRENT STATE

Maintain Worker Schedule

Indicates required fields

Save and Continue Cancel

Display By

Office: CalSAWS Project Office Select Unit: 00:00 View

Name	Worker ID	Functional Title
<input type="checkbox"/> Sticker, Deneen	90DP0000ZZ	Eligibility Specialist - Cambodian LC

Establish Schedule

Category: * - Select - Begin Date: * 03/17/2025 Begin Time: * - Select - End Time: * - Select - Unavailable for Tasks all day

Repeat Information

Do not repeat

Repeat [] week on Su Mo Tu We Th Fr Sa

Repeat on the [] of the month

End Date: 03/17/2026

Save and Continue Cancel

Can only add one schedule category at a time. Users must come back to this page multiple times to create a shoe schedule for day.

FUTURE STATE

Maintain Worker Schedule

Indicates required fields

Save and Continue Cancel

Display By

Office: Redlands TAD/WTW/Child Care/BIATC/PD Clear Unit: 00:00 Worker ID: Select View

Name	Worker ID	Functional Title
<input checked="" type="checkbox"/> Begum, Narain	26AS0AAX2N	Office Assistant III
<input type="checkbox"/> Kizurene, Shweta	26AS0AAX2R	TAD District Manager
<input type="checkbox"/> Muhammed, Ghena	26AS0AAX2C	Supervising Office Assistant
<input type="checkbox"/> Jacobic, Rai	26AS0AAX2D	TAD District Manager
<input type="checkbox"/> Swing, Roney	26AS0AAX2E	Office Assistant II
<input type="checkbox"/> Schone, Mayo	26AS0AAX2H	Office Assistant II
<input type="checkbox"/> Bidari, Anurita	26AS0AAX2J	Public Service Employee
<input type="checkbox"/> Bidook, Claude	26AS0AAX2J	Office Assistant I
<input type="checkbox"/> Chinnod, Arlene	26AS0AAX2L	Supervising Office Assistant

Establish Schedule

Method: * [] Set For: * [] Inavailable for Tasks All Days: Mo Tu We Th Fr Sa Su

Day	Category	Begin Time	End Time	Action
Monday	Available	7:30 AM	10:30 AM	Add
Tuesday				Add
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				

Repeat Information

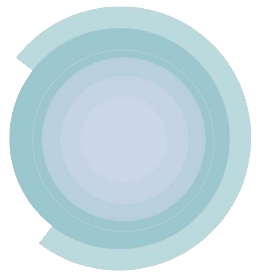
Frequency: * [] Resurrence: * [] Begin Date: * 03/17/2025 End Date: * 03/17/2025

Save and Continue Cancel

Add multiple schedule blocks at the same time. Reduces the number of times the user has to come back to this page to add additional schedule blocks. Added functionality to add multiple schedule blocks across one day and across a whole week.

Workload Management

Workload Reassignment | Future State Example: Users can now create automated workload reassignment rules to run on a recurring basis. This reduces workload so that workers no longer have to execute reassignments one by one.



CURRENT STATE

Workload Reassignment Detail

* Indicates required fields

Reassign

Unconfirmed Assignments: 10

From:

Worker ID: Select

Case Number: Select

From Any Eligible Position: Office: CalSAWS Project Office Select

Reassign Quantity:

Number of Cases:

Entire Workload:

Program: Language:

Case Flag: Status:

To:

Worker ID: Select

Unit: Select Units:

Auto Assign to Eligible Positions: Office: CalSAWS Project Office Select Remove

Auto Assign to Eligible Position in County:

Effective Date:

Effective Date:

Immediate Assignment:

Automatically Reassign When Activated:

Print New Worker Letter:

Reassign

Currently workload reassignments can only happen once, either immediately or at a future date.

FUTURE STATE

Workload Reassignment Detail

* Indicates required fields

Save Cancel

Unconfirmed Assignments: 0

Title: Workload Reassignment

Status: Active

Scheduled By: Makenzie Johnson

Last Run Date: 10/27/2025

From:

Worker ID: Select Remove

Case Number: Select

From Any Eligible Position: Office: CalSAWS Project Office Select

Reassign Quantity:

Number of Cases:

Entire Workload:

Program: Language:

Case Flag: Status: RE Date:

To:

Worker ID: Select

Unit: Select Units:

Auto Assign to Eligible Positions: Office: CalSAWS Project Office Select Remove

Auto Assign to Eligible Position in County:

Recurrence:

Frequency:

Begin Date:

End Date:

Weekday(s): Monday Tuesday Wednesday Thursday Friday

Reassignment Option:

Automatically Reassign When Activated:

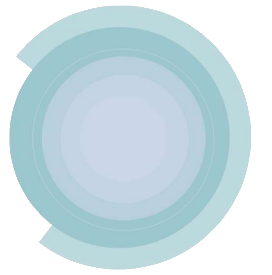
Print New Worker Letter:

Save Cancel

Added functionality for recurrence. This automates workload reassignments to run without user intervention.

Admin Configuration

Configurable Schedule Categories | Future State Example: Users can now configure schedule categories to best fit their County's need. This enhances the ability for Counties to specify certain blocks of time for certain activities and appointments.



CURRENT STATE

Legend	
Available for Appointment	Green
Available for Appraisal	Red
Available for IN/ES	Yellow
Available for NC	Pink
Appointment Scheduled	Black
Overlapping Appointments	Red
Not Specified	White
Unavailable	Grey
Lunch Hours	Orange
Telecommuting Days	Blue
Vacation Days	Purple
Leave	Light Green
Desk Time	Yellow-Orange
MSUDRP	Dark Red
Unavailable for Tasks	Cyan

Static legend and schedule categories

FUTURE STATE

Schedule Category Detail

* - Indicates required fields

Edit Close

Title: *
Available for ES/IN

Color: *
Yellow

Availability: *
Available

Begin Date: *
10/01/2025

End Date:

Display on Daily Availability Pop-Up: *
Yes

Description:

Appointment Categories *

Category	Type	Flexible Block Appointment	ES/IN
GA/GR Intake Interview			✓
General Appointment	Telephone Intake Interview	✓	✓
Intake Interview			✓

Edit Close

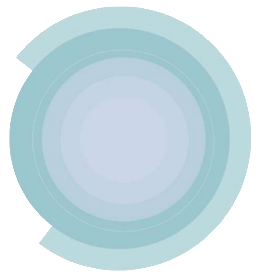
Counties can create unique schedule categories to align with their needs

Users can choose appointment categories schedule categories are available for

Users can choose an availability type for there schedule categories

Admin Configuration

Configurable Caseload Capacities | Future State Example: Counties can now set caseloads for workers across different priority levels that limit the number of cases workers can be assigned in a given day or month. This helps to automate and provide County configurability to case assignments.



CURRENT STATE

No Current State

FUTURE STATE

Caseload Capacity Configuration Detail

✱ Indicates required fields

Save Save and Apply to All Cancel

Title: ✱ Caseload Capacity Configu

Office: ✱ DPSS Customer Service Center V Select

Unit: [v]

Daily Assignment Capacity

Worker Priority	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
High	10	10	10	10	10	10	10
Medium	5	5	5	5	5	5	5
Low	2	2	2	2	2	2	2

Monthly Assignment Capacity

Worker Priority	Monthly Capacity
High	200
Medium	100
Low	50

Save Save and Apply to All Cancel

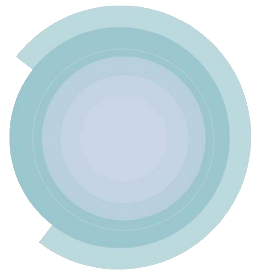
There are different priorities of workers so that capacities can vary across different groups of workers

Counties can specify Assignment Capacity for their workers. This will be utilized in a new page to select workers for assignment and in workload assignment logic

Configurations can be set up for the whole County, Office, or Unit

Overall Management

My Work | Future State Example: Users now have a new My Work page that shows a consolidated view of their upcoming appointments, schedule, tasks, etc. This reduces the load on the worker to flip through multiple pages to find all this information.



CURRENT STATE

Task Search

Case Number	Case Name	Program	Category	Type/Sub-Type	Status	Worker ID	Block ID	Date Appointed	Language
02-2014-PH-PH-000001	Case Name	02-2014-PH-PH-000001	Application Registration	02-2014-PH-PH-000001	Assigned	00000000	00000000	02/17/2025	English
02-2014-PH-PH-000002	Case Name	02-2014-PH-PH-000002	Application Registration	02-2014-PH-PH-000002	Assigned	00000000	00000000	02/17/2025	English
02-2014-PH-PH-000003	Case Name	02-2014-PH-PH-000003	Application Registration	02-2014-PH-PH-000003	Assigned	00000000	00000000	02/17/2025	English

Worker Schedule Search

Search Results Summary: Results 1 - 25 of 43

Date	Fixed Appt.	Block Appt.	Case	Customer	Type	Status
02/17/2025	8:00 AM to 8:15 AM	00000000	BRITTNEY BERDUX	Case Management Appointment	Rescheduled	
03/17/2025	9:15 AM to 9:30 AM	L417704	LADDE EHEL SWENK	Case Management Appointment	Rescheduled	
03/17/2025	9:30 AM to 9:45 AM	BL11261	DAWNA SHILTS	Case Management Appointment	Rescheduled	
03/17/2025	10:15 AM to 10:30 AM	BU20487	JACQUELINA RAILSBACK	Case Management Appointment	Rescheduled	
03/17/2025	3:00 PM to -	CH28501	CATALDO	Case	Rescheduled	

Application Date	Auth Date	RE Date	CFS
10/30/2025			
09/12/2025			
07/05/2023			
12/07/2017			
03/26/2024			
08/29/2025			
04/19/2019			
06/12/2015			

ID	Case Number	Worker Name	Worker ID	Status	Application Date
152A265	ANDRIJSSENS, ANDRIS 38F	GW	Active	05/05/2025	
L17581	ANDRIJSSENS, DOMINICO 33M	GW	Active	01/19/2024	
L774029	ANDRIJSSENS, JANEL 26M	GW	Active	02/02/2018	

Currently work can be found across multiple different pages in CalSAWS.

FUTURE STATE

My Work

16/28/2025

Legend

Upcoming Schedule

Date	Day	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM
02/20/2025	Monday												
02/21/2025	Tuesday												
02/22/2025	Wednesday												
02/23/2025	Thursday												
02/24/2025	Friday												
02/25/2025	Saturday												
02/26/2025	Sunday												

Upcoming Appointments

Date	Fixed Appt.	Block Appt.	Case	Customer	Type	Status
02/16/2025	8:00 AM to 10:00 AM		123067	00000	WOLFENDEN	Scheduled
02/16/2025	9:00 AM to 12:00 AM		123067	00000	WOLFENDEN	Scheduled

New Assignments

Case Number	Primary	Program	Status	Application Date	Auth Date	RE Date	CFS
000000	CROSER, DILLON 60M	WT	Pending	05/09/2012			
000000	CROSER, DILLON 60M	RE	Pending	10/11/2015			
000000	CROSER, SANDY 66F	MC	Pending	10/11/2015			
000000	CROSER, SANDY 66F	CV	Pending	04/09/2012	10/04/2013	01/2014	

Upcoming/Overdue Tasks

Due Date	Case	Program	Category	Type/Sub-Type	Status	Language
10/30/2025	000000	CF	Self Service Portal Communications	BC Exception	Assigned	English
09/12/2025	000000	CW	Self Service Portal Communications	BC Exception	Assigned	English
12/07/2017	000000	CF	Self Service Portal Communications	BC Exception	Assigned	English
03/26/2024	000000	CW	Self Service Portal Communications	BC Exception	Assigned	English
08/29/2025	000000	CF	Self Service Portal Communications	BC Exception	Assigned	English

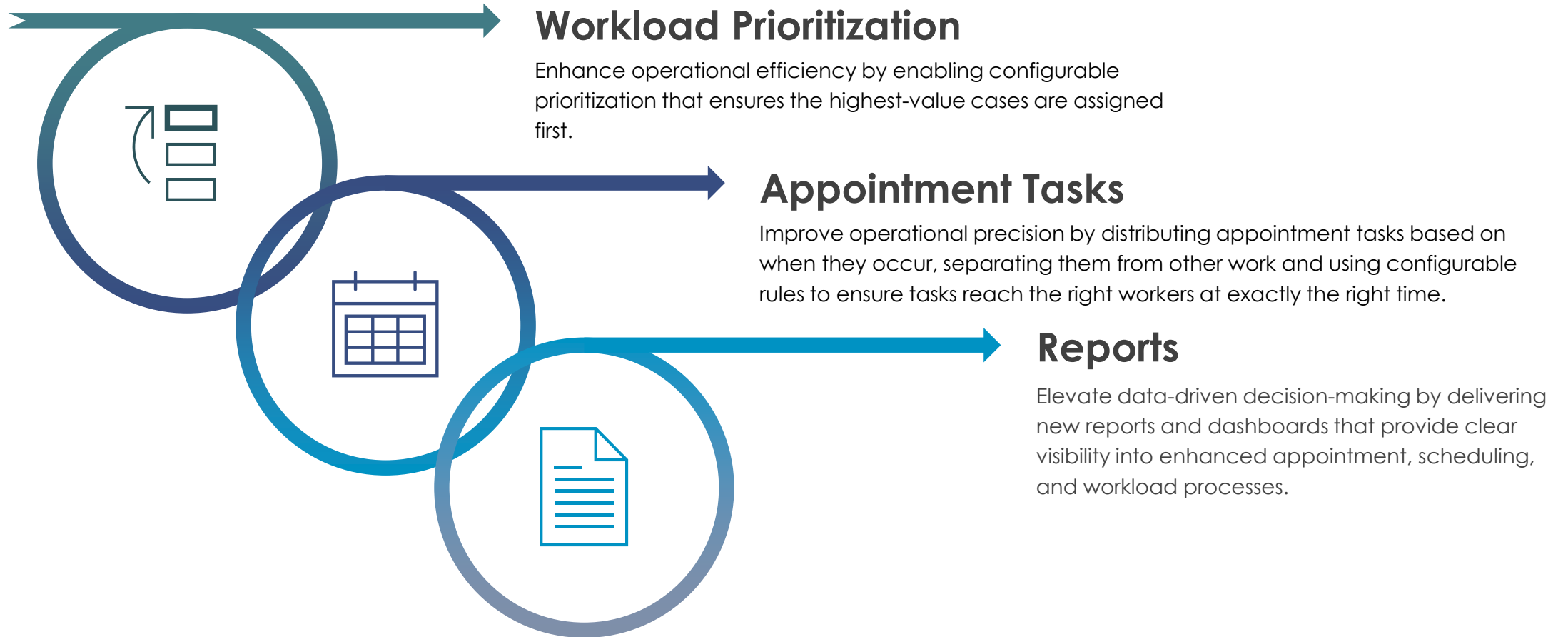
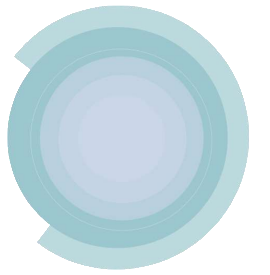
Messages

Type	Status	Subject	Created Date	Last Updated	Case Number
Message	Received	0-Phone1	05/31/2025 11:11 PM	10/20/2025 11:11 PM	214706
Message	Received	0-Phone1	05/31/2025 02:36 PM	10/22/2025 02:57 PM	200109
Message	Received	0-Phone1	05/30/2025 06:14 PM	10/22/2025 06:14 PM	029703
Message	Received	0-Phone1	05/30/2025 06:07 PM	10/25/2025 06:08 PM	029703
Message	Received	0-Phone1	05/30/2025 12:44 PM	10/25/2025 06:09 PM	029703
Message	Received	0-Phone1	05/29/2024 11:13 PM	10/25/2025 06:09 PM	029703
Message	Received	0-Phone1	05/29/2025 11:06 PM	10/25/2025 06:09 PM	029703
Message	Received	0-Phone1	05/28/2025 01:58 AM	10/25/2025 06:09 PM	200109
Message	Received	0-Phone1	05/18/2025 12:01 PM	10/25/2025 06:09 PM	200109
Message	Received	0-Phone1	05/14/2025 09:45 AM	10/25/2025 06:09 PM	214800

One consolidated page to view all the work for a user.

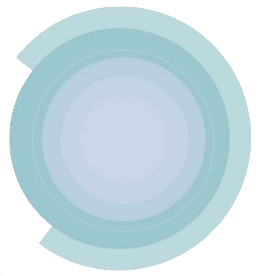
Workload Management Phase 2

September 2026 Release | Change Impact Analysis to begin end of March 2026



Workload Management OCM Activities

Organizational Change Management (OCM) Key Focus Areas



OCM identifies actions that support change adoption. Below are the four key areas where OCM conducts change activities.

CHANGE IMPACT ASSESSMENT

Provides defined, impact-aligned mitigations with actions, owners, and timing to support communications, engagement, and readiness.

STAKEHOLDER ENGAGEMENT

Outlines an engagement approach aligned to stakeholder needs, including targeted outreach, and timely updates and resources.

COMMUNICATIONS

Delivers tailored materials by audience, including monthly bulletins and ad hoc items such as newsletters, FAQs, one pagers, demo notifications, and pre and post go live resources.

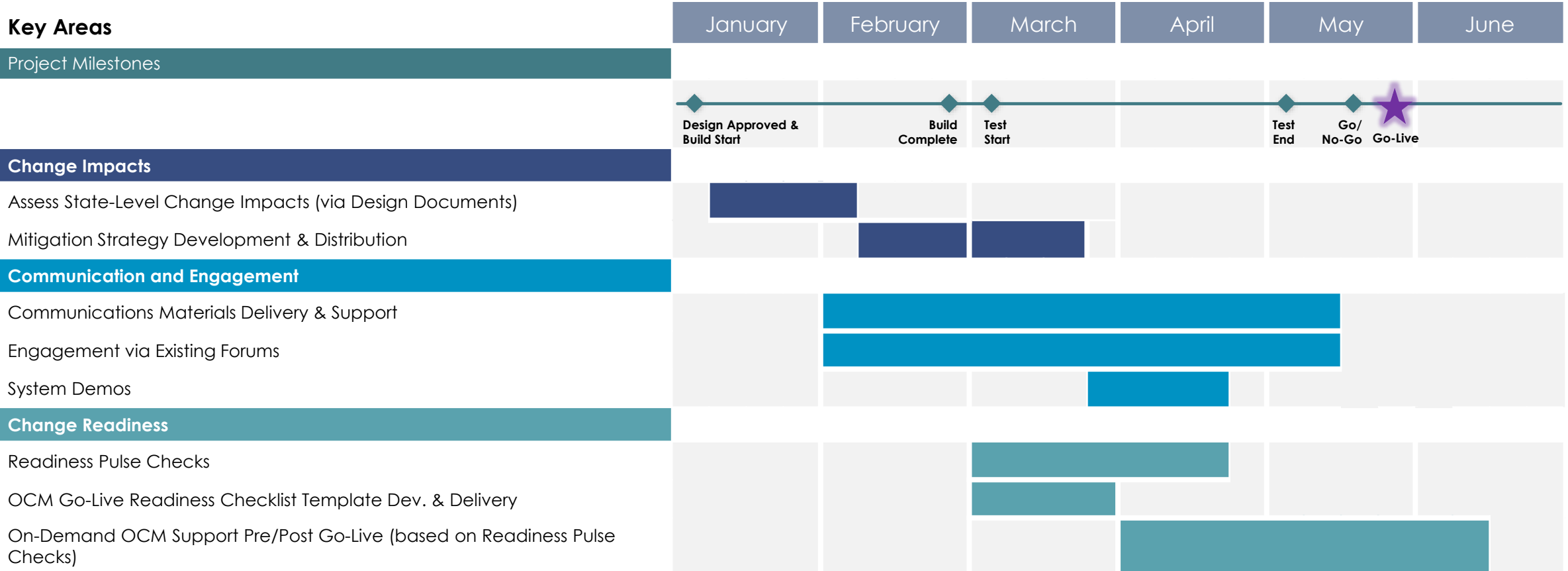
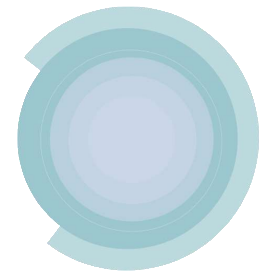
CHANGE READINESS

Provides targeted readiness support through Readiness Pulse Checks, Readiness Checklist Templates, Go-live Resources, Workload Management Webcasts, and Post Implementation Office Hours.

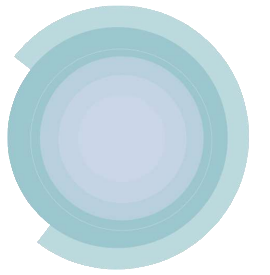


Project Milestones & OCM Activities Timeline

Phase 1 Implementation



Resources Around the Corner



Various channels and activities exist to support end users through their change journeys for Workload Management.



MONTHLY BULLETIN

- *Project Milestones*
- *Key Dates*
- *“What’s Changing” Information*
- *Upcoming Activities*



ON-DEMAND COMMS MATERIALS

- *FAQs*
- *One-pagers*
- *Demo Notifications*
- *Pre/Post Go-live Resources*



COUNTY ENGAGEMENTS

- *Workload Management focused Regional Connects*
- *Materials/Talking Points for County-Oriented Engagements (Manager Site Visits, JPA/PSC Meetings, etc.)*
- *Workload Management Enhanced Demonstrations*



CHANGE READINESS ACTIVITIES

- *Readiness Pulse Checks*
- *Readiness Checklist Template*
- *Go-live Resources*
- *Workload Management Webcast*
- *Post Implementation Office Hours*

Spotlight: Enhanced Demonstrations

Demonstrations will show exactly what's changing, why it matters, and how the enhancements will look in the system before go-live.



OVERVIEW OF WHAT'S CHANGING

End users review upcoming workflows, screens, and features, with a clear summary of what to expect at go-live.



VISUAL SYSTEM WALKTHROUGHS

End users see key functionality from the enhanced system through screenshots and a live walkthrough.



Q&A FORUM

End users ask questions and receive answers in real time.

ANTICIPATED OUTCOMES

- Further insight on what's changing
- Awareness of enhancements available to opt in to
- Increased likelihood of adoption
- Two-way engagement that strengthens understanding