

Administration for Children and Families  
Office of Family Assistance  
Region IX

2011 Innovative Solutions Workshop

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Summary Report



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## Introduction

In 1996, the Temporary Assistance for Needy Families (TANF) Program was created through the Personal Responsibility and Work Opportunities Reconciliation Act (PRWORA), dramatically changing the social welfare system in the United States. The implementation of the TANF program at the State and local levels brought about significant decreases in the number of low-income families receiving public welfare from approximately 4,543,397 cases in 1996 to 1,880,696 families in 2011.<sup>1</sup> Since the onset of the Great Recession in 2007, the United States has struggled with national unemployment rates that have stagnated at 9.0 percent.<sup>2</sup> Given this difficult economic climate, TANF remains an important part of the safety net for low-income families and children, yet TANF agencies are being charged to do more with less. The Region IX 2011 Administrators Technical Assistance Meeting provided State and Territory TANF administrators with the opportunity to engage in strategic dialogue in order to identify innovative practices and partnerships that better support America's children and families during these challenging times.<sup>3</sup>

## Opening Session

Ms. Julie Fong, TANF Program Manager, ACF/OFA Region IX, Ms. Sharon Fujii, ACF Regional Administrator and Dr. Earl Johnson, Director, Office of Family Assistance (OFA), welcomed attendees to the Region IX *Innovative Solutions Workshop* which focused on “doing more with less” and provided practical, innovative solutions and strategies for universal challenges and difficulties faced by Temporary Assistance for Needy Families (TANF) programs.<sup>4</sup> The challenges faced by TANF participants are great and those faced by TANF programs are vast, but this time in the history of the program allows for increased strategic thinking about effective methods for serving all families, including non-custodial parents, refugees, and individuals with disabilities through partnerships with the U.S. Department of Labor, Employment and Training Administration, Child Welfare, and health care offices. Dr. Johnson, Ms. Fujii, and Ms. Fong agreed that *innovation involves vision, risk taking and strong leadership at all levels* and encouraged TANF program administrators to act as “change agents” and capitalize on opportunities during the meeting to share information with leadership, to improve and strengthen TANF programs.

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<sup>1</sup> United States Department of Health and Human Services, Administration for Children and Families. (2011, August 10). *Data and Reports*. Retrieved September 9, 2011, from Office of Family Assistance: <http://www.acf.hhs.gov/programs/ofa/data-reports/index.htm>

<sup>2</sup> United States Department of Labor, Bureau of Labor Statistics. (2011, November 14). Economic News Release. Retrieved November 14, 2011, from Bureau of Labor Statistics: <http://www.bls.gov/news.release/empst.nr0.htm>

<sup>3</sup> Seventeen individuals participated in this technical assistance activity which was held in San Francisco, California on September 21-22, 2011. For detailed information on the themes of the activity, attendees, and speakers, please see Appendix A-C. Additionally, the presentations are available on the Welfare Peer Technical Assistance Network at <http://www.peerta.acf.hhs.gov/index.cfm?event=viewTopic&sectionTopicId=18&topicId=8&tabtopic=8&sectionId=2&nav=8>

<sup>4</sup> The Patient Protection and Affordable Care Act (ACA), signed into law on March 23, 2010, reforms aspects of the private and public health insurance industries. The Congressional Budget Office estimates that this reform will reduce the number of nonelderly uninsured Americans by 32 million people.

Congressional Budget Office, (2010). *Cost estimate for pending health care legislation*. Retrieved from website: <http://cboblog.cbo.gov/?p=546>

## TANF Reauthorization, Administrative Flexibility and TANF Reporting Forum

The US Congress is scheduled to reauthorize the TANF program and ACF has been seeking to identify areas where Federal requirements around verification interfere with program outcomes and where modifications can be made to current TANF policy. Mr. Mark Greenberg, Deputy Assistant Secretary for Policy, Administration for Children and Families and Dr. Johnson sought feedback from meeting attendees on administrative flexibility, the Claims Resolution Act of 2010, work participation rates, performance measures, and potential topics of research for ACF to fund.<sup>5</sup> The discussion centered on several key issues of importance to the attendees ranging from clarification around the scope of ACF's regulatory control to work participation and verification policy.

### *Issue One: ACF's Regulatory Authority*

With regard to ACF's regulatory authority, there are many things that ACF is able to interpret with regard to the TANF statute, but specifics on the regulatory authority for ACF has yet to be updated based on changing Federal policy. Nonetheless, Mr. Greenberg stated that despite some questions about authority and the time consuming nature of the entire regulatory process, ACF can move ahead with a *regulatory package* with regard to TANF even as Congress is considering reauthorization. Based on this understanding, attendees suggested several regulatory changes including:

- ✓ penalty relief for States that have not made work participation requirements or other TANF program requirements because State budgets continue to struggle to recover from the most recent economic downturn;
- ✓ allowing counties to include TANF participants' placed in subsidized employment activities in their work participation rate;
- ✓ granting a waiver to allow States to extend the engagement time limit beyond thirty days; and
- ✓ providing TANF participants with the option of pursuing a General Education Development (GED) degree while employed in a part-time position.

### *Issue Two: The Claims Resolution Act of 2010*

The Claims Resolution Act of 2010 extended the TANF program and outlined new reporting requirements (herein 812 data) for engagement in additional work activities among TANF participants. Mr. Greenberg noted that ACF is aware of the challenges that States are facing as they attempt to respond to the new 812 data reporting requirements. ACF has gathered information from the field on the challenges around the regulations pertaining to barrier reduction activities that negatively impact Claims Resolution Act accounting

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<sup>5</sup>The Claims Resolution Act of 2010 required States to report on the activities of work-eligible individuals on their caseloads. On February 14, 2011, the Department of Health and Human Services issued Program Instruction TANF-ACF-PI-2011-03 and a new reporting form (Form ACF-812, the "Report on Engagement in Additional Work Activities for Families Receiving Assistance under the TANF and SSP-MOE Programs") to implement the work participation-related data collection requirements of the Claims Resolution Act of 2010. United States Department of Health and Human Services, Administration for Children and Families. (2011, March). *Engagement in Additional Work Activities and Expenditures for Other Benefits and Services. March 2011: A TANF Report to Congress Temporary*. Retrieved November 16, 2011, from Office of Family Assistance [http://www.acf.hhs.gov/programs/ofa/data-reports/cra-report-to-congress/cra\\_report-to-congress.html](http://www.acf.hhs.gov/programs/ofa/data-reports/cra-report-to-congress/cra_report-to-congress.html)

and work participation rates and it is currently making strides to offer increased technical assistance and program support to States having specific challenges meeting the 812 data reporting requirements.

*Issue Three: Work Participation Rate Calculation and Improvement*

Mr. Greenberg and Dr. Johnson engaged in a discussion with the meeting attendees focused on the challenges of meeting the rate during a jobless recovery and possibilities for improving it. The attendees had several recommendations for improving the ability of States to achieve the *rate* and to increase the rate of participation in allowable activities by TANF participants. Some of the key recommendations included:

- ✓ indexing-- basing the calculation of the different variables more aligned with current workforce and employment trends—the work participation rate so that it can be more responsive to changing economic and employment challenges (similar in structure to what is used in the SNAP program when need increases);
- ✓ aligning the calculation of the work participation rate with those outlined by the U.S. Department of Agriculture for the SNAP program using the Labor Surplus Designation;<sup>6</sup>
- ✓ including partial credit in the work participation rate, which would allow State and county TANF programs to count TANF participants engaged in any allowable work activities regardless of the number of hours they participate; and
- ✓ modifying TANF to allow a combination of allowable work activities to count in the work participation rate.

*Issue Four: Differential Metrics and Alternative Measures*

Though States and Territories are currently required to meet and report data on the work participation rate, ACF and OFA leadership and national experts on TANF have recently discussed differential metrics for assessing and measuring the effectiveness of TANF.<sup>7</sup> The attendees engaged Mr. Greenberg and Dr. Johnson on the desire to use alternative measures to TANF performance as well as additional measures specifically linked to TANF outcomes such as employment placement, sustained employment, wage increases, credentialing, and reduced recidivism. Some States and Territories are currently experimenting with different performance and outcome measures including unsubsidized employment, wage increases, longer-term employment, and reduced recidivism.

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<sup>6</sup> U.S. Department of Agriculture, (2011). *Agency information collection activities: Proposed collection; comment request; waivers under section 6(o) of the food and nutrition act*. Retrieved from Web site: <http://www.gpo.gov/fdsys/pkg/FR-2011-09-20/html/2011-24086.htm>

<sup>7</sup> On September 13, 2011 at the National Association of Welfare Research and Statistics (NAWRS) Annual Workshop, ACF leadership, national TANF experts, and practitioners discussed the supplemental poverty measure and developing and using differential metrics to document the effectiveness of TANF programs. The session was sponsored by the Office of Family Assistance and an executive summary of the session is available on the Welfare Peer Technical Assistance Network at: [www.peerta.acf.hhs.gov/index.cfm?event=viewTopic&sectionTopicId=7&topicId=7&tabtopic=7&sectionId=1&nav=7#general](http://www.peerta.acf.hhs.gov/index.cfm?event=viewTopic&sectionTopicId=7&topicId=7&tabtopic=7&sectionId=1&nav=7#general) United States Department of Health and Human Services, Administration for Children and Families. (2011, September 13). *Executive Summary of the National Association for Welfare Research and Statistics 2011 Workshop Session: Understanding the Supplemental Poverty Measure (SPM) and Developing Differential Metrics to Strengthen the Effectiveness of TANF Programs* November 17, 2011, from Office of Family Assistance.

According to Mr. Greenberg these are some of the most frequently used outcomes measures and ACF is continuing to collect information from the States, Tribes, and Territories on differential metrics and alternative measures that can possibly influence TANF reauthorization when Congress takes up the issue.

## TANF at 15: Policies, Progress and Promise

As the TANF program reaches 15 years of implementation, the needs of TANF programs and TANF participants have changed. Dr. Jeanette Hercik, Vice President, ICF International, discussed the tremendous changes to the TANF program since its initial passage and the 2005 reauthorization. From the perspective of the field, the changes have increased the need for more innovation and more integration and the attempts to implement a program that increased economic self-sufficiency through increased employment has had its ups and downs. Since its inception, TANF's focus has been "work first" and employment and there has been decreased focus on the use of TANF as a safety net program. Although caseloads decreased significantly in the early years of TANF, there has been some abatement during the most recent recession and recovery. From the perspective of the field, the creation of TANF coincided with a booming economy and increases in initiatives—the Earned Income Tax Credit (EITC), child care support, increased child support enforcement—that incentivized work, but since the early 2000s there have been increased challenges achieving employment outcomes for TANF participants and meeting the performance measures inherent in the TANF legislation. Additionally, there has been increased attention to and focus on the performance measurement of frontline workers and the types of services available—and most effective—to meet the needs of diverse clients with different barriers and strengths. According to Dr. Hercik, the challenges and changes for TANF over the past 15 years can be conceptualized as three waves of change involving supports to get people into paid employment, barrier reduction, and transitional supports. Many of these challenges continue today and are amplified by the economic recession, major funding cuts in State's budgets, caseload dynamics, and differential metrics (or alternative performance measures for program success). Dr. Hercik suggested that the next wave of change for TANF should involve examining assessments of frontline workers and processes; restructuring case management; and developing partnerships with other agencies and community-based organizations.<sup>8</sup>

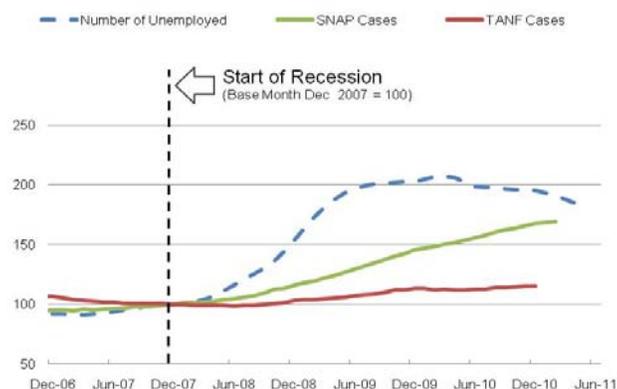
Liz Schott, Senior Fellow, Center on Budget and Policy Priorities (CBPP) presented on TANF's past performance and provided recommendations for improving State and Territory TANF programs. According to her research, there has been a precipitous decline in TANF's role in providing income support to poor families and there has been a disappearance of the employment gains which occurred in the early TANF years due partially to a strong economy rather than employment strategies. Further, TANF caseloads have lagged behind the need of clients in responding to the recession (see Figure 1 on page 7), which suggests that TANF's effectiveness as a safety net program has diminished.<sup>9</sup>

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<sup>8</sup> This presentation is available on the Welfare Peer Technical Assistance Network at: <http://peerta.acf.hhs.gov/uploadedFiles/ICF%20presentation1.pdf>

<sup>9</sup> This graph was extracted from Ms. Schott's presentation which is available on the Welfare Peer Technical Assistance Network at: <http://peerta.acf.hhs.gov/uploadedFiles/CBPP%20presentation.pdf>

*Figure 1: TANF Caseload Lags Behind Need in Response to Great Recession*



Given the current context of TANF, Ms. Schott provided recommendations for improving work programs and improving TANF as a safety net program. Suggestions for improving work programs included considering less costly ways to meet the work participation rate; targeting some work activities while skipping others and considering exemptions; and including activities that are reasonable in this economic context such as subsidized jobs and education to develop skills for future jobs. Recommendations for improving TANF as a safety net program included examining the poor or deeply poor families who are not being served by TANF in contrast to the SNAP caseload and responsiveness, and assessing the needs of those on the TANF caseload that are unlikely to leave the caseload for employment.

### State/Territory Roundtable

Following the morning sessions which set the national policy context and provided a historic review of the TANF program, meeting attendees provided updates on specific challenges in delivering services to TANF families during the present economic difficulties and discussed strategies to overcome the challenges. Attendees also shared innovative strategies developed at the local level to improve program effectiveness, while increasing effective client programming. The key themes that emerged during the roundtable were work participation rates; employment strategies and programs; budget and resource cuts and their impact on programs; business process management; and collaborations with government agencies and community organizations.

Specifically attendees discussed:

- challenges meeting the all-families and 2-parent work participation rate;
- challenges of achieving the work participation rate in the wake of the recalibration of the caseload reduction credit;
- reductions in State expenditures that would qualify as excess Maintenance of Effort (MOE) funds;
- improved employment strategies and programs like subsidized employment and assessment;

- strengthened partnerships with workforce systems, government agencies, and community-based organizations and the One-Stop system<sup>10</sup>;
- establishing performance-based contracts for employment services;
- local budget cuts and limited resources for their respective TANF programs;
- shortened time limits for participants in the TANF program;
- reductions in monthly cash payments; and
- TANF program staff reductions, various program realignments, and altered process management activities.

## Reshaping Intervention, Expanding Options – Innovative Strategies for Addressing the Needs of Domestic Violence Survivors in the TANF Caseload

During this moderated discussion, presenters provided meeting attendees with innovative approaches for identifying and servicing domestic violence survivors in the TANF caseload. Presenters and attendees also discussed ways to link community partners and resources related to domestic violence. Innovative ideas around economic empowerment for domestic violence survivors shared during this session are listed in Figure 2.

*Figure 2: Innovative Ideas Around Economic Empowerment*

- Partnerships with banks and/or credit unions;
- Second chance bank accounts;
- Training for survivors in understanding banking, credit, debt, and money management;
- Field trips to open bank accounts; and
- Access to financial coaching.

Kelly Goodall, Economic Empowerment Manager, Illinois Coalition Against Domestic

Violence, discussed the Economic Empowerment Project fund and the various services available to domestic violence stakeholders that can greatly improve the ability of domestic violence survivors to gain economic independence and escape violent situations. The project includes training, technical assistance, and community partnership components all aimed at providing support, resources, and information on how domestic violence survivors can deal with economic abuse and its effects. Not only are victims of domestic violence physically and mentally abused, but they are isolated from economic opportunities and deprived of avenues to achieve greater levels of economic independence.

<sup>10</sup> One-stop centers were established under the Workforce Investment Act of 1998 and provide employment and training services to the public as well as TANF participants.

For many victims, economic abuse is defined as a powerful and prevalent tactic used by abusers to have power and control over their victims (see Figure 3) is a primary tactic used by abusers to control their victims and prevent them from accessing assistance and leaving the abusive situation.

Ms. Goodall emphasized the necessity of tailoring financial education to domestic violence survivors because many survivors feel that information presented through

traditional financial education programs does not address their safety concerns. Thus, to increase the effectiveness of financial education for domestic violence survivors on the TANF caseload, it is important to modify financial education curricula through activities, creating a space that fosters discussion, normalizing the information, and relating it back to their experiences. Ms. Goodall also underscored the importance of having a flexible model for both the program and the domestic violence survivor; for example, tailoring the information presented at the program level but also considering the financial literacy level of the survivor and whether the information will overwhelm them.

*Figure 3: Examples of Economic Abuse*

- Controlling financial resources/how money is spent;
- Destroying a partner's credit;
- Withholding money/giving an allowance;
- Not allowing a partner's name on accounts;
- Stealing from a partner; and
- Prohibiting a partner from work or education.

Ms. Goodall suggested that States and Territories contact their State domestic violence coalition for assistance in identifying agencies currently doing economic advocacy work. She also encouraged attendees to connect with asset-building and other financial resources to create a foundation for survivors which allow them to pursue other financial opportunities in their community.<sup>11</sup>

*Figure 4: Services provided by the Client Assistance Fund*

- Rental assistance;
- Deposits for utilities;
- Car repairs;
- Work clothing;
- Motel Stays; and
- Transportation.

Colsaria Henderson, Managing Advocate, Family Violence Law Center, provided the attendees with practical recommendations from the center and discussed the Client Assistance Fund (CAF) in California. CAF is a collaboration between the Social Security Administration and domestic violence service providers and provides CalWorks and CalWorks-eligible domestic violence survivors with goods and/or services that will help stabilize the client's family home and increase the client's ability to secure and maintain employment (see Figure 4 for specific services provided by CAF). The fund provides \$2,000 to \$3,000 of assistance yearly to CalWorks-eligible domestic violence

<sup>11</sup> This presentation is available on the Welfare Peer Technical Assistance Network at: <http://peerta.acf.hhs.gov/uploadedFiles/ICADV%20TANF%20Conference%20Presentation.pdf>

survivors. In order to qualify for the full yearly total amount of cash assistance, CalWorks-eligible domestic violence survivors must apply for CalWorks.<sup>12</sup>

Claire McCullough, Community Program Director, Las Casa De Las Madres, provided the attendees lessons learned from managing Las Casas De Las Madres' Economic Empowerment Project. Las Casas De Las Madres is a local agency in San Francisco which connects domestic violence survivors with financial literacy knowledge, tools, and experts. In partnership with the San Francisco District Attorney's Office and Bank on San Francisco, Las Casa De Las Madres created Economic Empowerment Workshops. Based on experiences developing the workshop series, Ms. McCullough discussed strategies around collaborating with community organizations and strengthening relationships with financial institutions. In addition, Ms. McCullough shared the following results from three workshop series conducted in Fall 2010, Spring 2011, and Summer 2011: participants had an enhanced understanding of bank, credit, debt, and money management; opened bank accounts during bank field trips; and, are using banks instead of pay day lenders.<sup>13</sup>

## Asset Development, Financial Fitness and TANF – Strategies for Integrating Programs and Meeting the Long-term Economic Self-Sufficiency Needs of TANF Participants

Financial assets enable individuals to move beyond paycheck to paycheck budgeting and life style, and thus are critical components of the transition toward long-term financial stability. Financial assets also lead to stronger, healthier families; enhanced self-esteem, long-term thinking and planning, more community involvement, and hope for the future (see Figure 5 for examples of assets). This moderated discussion provided attendees

with an opportunity to hear and discuss innovative strategies for improving the ability of TANF participants to improve long-term economic self-sufficiency through asset development and financial fitness. Attendees engaged with peers and presenters on strategies around program integration and linking community partners and resources related to asset building and financial fitness.

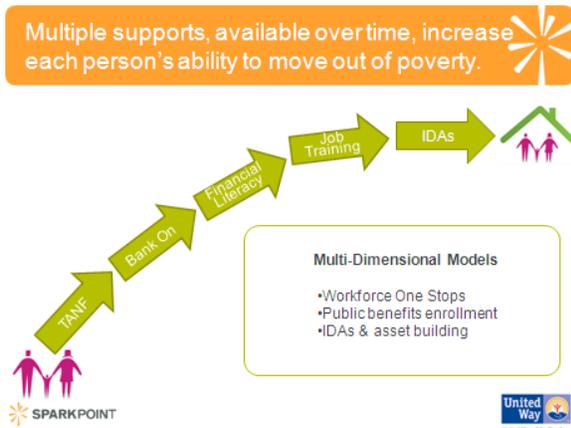
*Figure 5: What are Assets?*

- Human capital;
- Property, equipment, and land;
- Good credit report and score and access to credit;
- Savings (3-6 months worth) to protect against loss of income/emergencies; and
- Matched savings such as a first home, higher education and training, and developing or expanding a small business.

<sup>12</sup> This presentation is available on the Welfare Peer Technical Assistance Network at: <http://peerta.acf.hhs.gov/uploadedFiles/CAF%20presentation1.pdf>

<sup>13</sup> This presentation is available on the Welfare Peer Technical Assistance Network at: <http://peerta.acf.hhs.gov/uploadedFiles/Economic%20Empowerment-LaCasaPresentation-TANF.pdf>

*Figure 6: The Impact of Supports on a Person's Ability to Move out of Poverty*



Lorne Needle, Chief Community Investment Officer, United Way of the San Francisco Bay Area, showcased the SparkPoint Center, a one-stop financial integration service center which works with families to build financial stability in eight centers throughout the Bay Area and Fresno, California. SparkPoint was designed to address a knowledge gap—clients’ lack of knowledge about services and how to access them—and an access gap—clients having to travel to multiple agencies to apply for benefits. The SparkPoint Center targets three areas: improving credit, increasing income, and building assets. Bundling asset strategies with TANF programming focused on workforce development and

barrier reduction increases each person’s ability to move out of poverty (see Figure 6). In order to better combine asset strategies with TANF programming, Mr. Needle recommended increased investment in short and long term strategic planning around asset development and financial fitness; providing individualized attention to clients to help them achieve individualized goals; allowing financial fitness activities to count as work participation activities; and allowing travel time for work requirements for areas with limited transportation access to count toward work participation.<sup>14</sup>

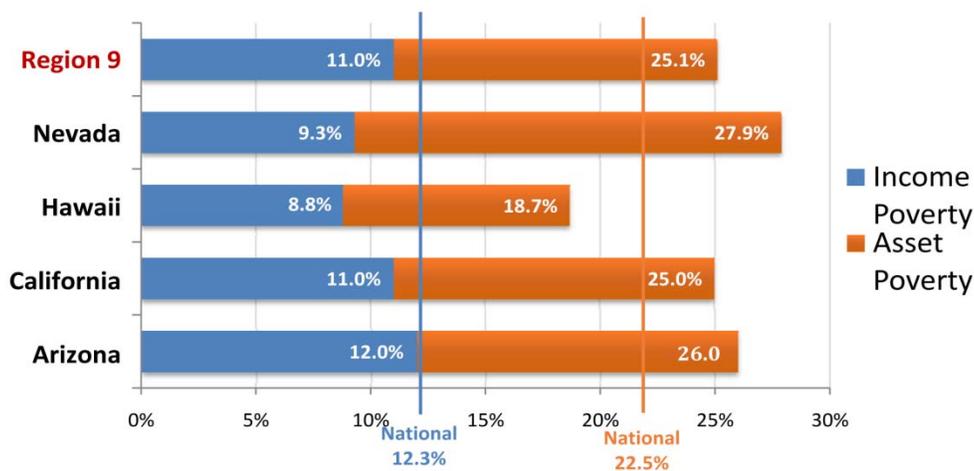
Nicole Levine, Executive Director, The Women’s Initiative, presented the organization’s model and shared lessons learned. The Women’s Initiative is a program that builds the entrepreneurial capacity of high-potential low-income women to overcome economic and social barriers and achieve self-sufficiency in San Francisco and the North Bay. The Women’s Initiative program trains, funds, and supports low-income women who are ready to start or expand a business. Approximately 80 percent of The Women’s Initiative clients are women of color; 36 percent have a high school equivalency or less; 25 percent report recent domestic violence; and 24 percent report a disability. The program’s training involves personal development skills, technology skills for business, an entrepreneurial readiness workshop, a business course, and a culturally competent curriculum for Latina entrepreneurs. Microloans from 500 to 35000 dollars help clients build good credit, and two to one matched savings accounts assist clients with buying a home, capitalizing a business, or pursuing an education. Emphasizing the importance of ongoing support to ensure that micro-businesses thrive, Ms. Levine noted that The Women’s Initiative supports clients through a variety of services including consultations and coaching, networking groups and events, access to markets and tradeshows, and seminars with business leaders. The Women’s Initiative captures program outcomes such as income increases and job creation as well as the return on investment and economic

<sup>14</sup> This presentation is available on the Welfare Peer Technical Assistance Network at: <http://peerta.acf.hhs.gov/uploadedFiles/Sparkpoint%20UWBA.pdf>

impact of the program for funders, investors, and communities.<sup>15</sup>

In order to provide a national context for the local initiatives presented by Mr. Needle and Ms. Levine, Sierra Solomon, Associate, ICF International- Assets for Independence (AFI) Resource Center, provided information on the ASSET initiative and effective asset building tools and practice for ACF grantees. Emphasizing the importance of assets for long-term economic self-sufficiency, Ms. Solomon explained that financial assets help families get ahead whereas income helps families pay for their bills on a paycheck to paycheck basis. Ms. Solomon provided background information on the rates of household income poverty and asset poverty in Region IX (see Figure 7) and provided an overview of asset building strategies that can be incorporated into TANF programs.

*Figure 7: Rates of Household Income Poverty and Asset Poverty in Region IX*



Source: CFED's 2009-2010 Assets & Opportunity Scorecard.

Specifically, Ms. Solomon discussed The ASSET Initiative which is a collaboration across ACF programs aimed at bringing the six core asset-building strategies—financial education, getting banked, borrowing/debt management, individual development accounts (IDAs), public benefits, and tax credits—to ACF grantees and families served in ACF programs. TANF programs can collaborate with the ASSET Initiative to train case workers to include asset-building activities and goals in participants' individual service plans; conduct outreach about the EITC and provide referrals to free tax preparation assistance sites; offer financial education and credit counseling as "Job Search and Job Readiness" work activities; train eligibility screeners and case workers to refer TANF participants to asset building services; and, apply for an AFI grant to offer IDAs and financial education to working and transitioning TANF participants. Ms. Solomon

<sup>15</sup> This presentation is available on the Welfare Peer Technical Assistance Network at: [http://peerta.acf.hhs.gov/uploadedFiles/Women%27s%20Initiative\\_TANF%20Conference%202011.pdf](http://peerta.acf.hhs.gov/uploadedFiles/Women%27s%20Initiative_TANF%20Conference%202011.pdf)

noted that all TANF-eligible individuals are automatically eligible for Assets for Independence.<sup>16</sup>

## Strategies to Improve Career Pathways for Low-Income Workers

This facilitated discussion provided attendees an opportunity to discuss strategies to increase/improve TANF work participation using innovative program strategies and services, including career pathway development, career laddering, and service coordination with community colleges and other partners. Setting an overview of career pathways programs and evaluations of career pathways programs from a national perspective, Lauren Eyster, Research Associate, The Urban Institute, described career pathways and highlighted current research projects. Key elements of career pathways programs include:

- ✓ assessments of career training/readiness;
- ✓ selection of appropriate training providers and capacity-building within those providers;
- ✓ supports that help with student retention; and
- ✓ employment assistance to ensure that workers have the appropriate and needed work supports to cover additional expenses.

In order to achieve greater outcomes for clients, there is increased need to ensure that worker skills are matched with the specific employer needs. So, there is increased need—particularly for low-skilled, low-income, and low-wage workers—for a greater understanding of labor market analyses, which play a key role in determining what career pathways are available for local communities. Common industries for career pathways programs include healthcare, advanced manufacturing, green/energy, and biotechnology, but always depend on local and regional labor market needs. For instance, The High Growth Job Training Initiative on education (2001) illuminated lessons learned from implementation (see Figure 8) of the initiative and how programs can better assist clients prepare for the world of work.<sup>17</sup>

### *Figure 8: Lessons Learned from the High Growth Job Training Initiative*

- Employers are important partners in implementing all aspects of an industry-driven project;
- New training technologies can be used to improve the quality of training and expand access to training;
- Instructors with industry-specific knowledge and experience are needed but they can be difficult to hire and retain;
- Projects need to be flexible to respond to changes in the external environment;
- Both monetary and non-monetary resources from partners, especially from employers, are difficult to secure; and
- Hands-on training components are important to replicating actual work experience.

<sup>16</sup> This presentation is available on the Welfare Peer Technical Assistance Network at:

<http://peerta.acf.hhs.gov/uploadedFiles/Asset%20Initiative%20Presentation.pdf>

<sup>17</sup> This presentation is available on the Welfare Peer Technical Assistance Network at:

<http://peerta.acf.hhs.gov/uploadedFiles/Career%20Pathways%20-%20Region%20IX%20meeting%20%28Eyster%29.pdf>

Carin Zimmerman, Biotechnology Instructor and Coordinator, Stem Cell Technology Certificate Program, City College of San Francisco, discussed lessons learned from implementing the Bridge to Biotech career pathways program in the Bay area. This program is designed to serve low-income individuals who do not have a science background and employs an integrated, contextualized learning concept, similar to the IBEST model, which strives to improve basic education skills and career/ job skills. The Bridge to Biotech program targets adult students without a scientific background and 8-9<sup>th</sup> grade Math and English skills, and approximately 82 percent of students complete the program. Reflecting on the implementation of the program, Ms. Zimmerman encouraged meeting attendees to brainstorm industries in their community that could be incorporated into career ladder programs designed to move TANF participants into well-paying jobs which have the potential to lead to careers.<sup>18</sup>

Lessons learned from implementing a career pathways program were shared by Diane Spatz, Executive Director, Low-Income Families' Empowerment through Education (LIFETIME). She discussed the role and importance of elements of career pathways programs such as assessments, wraparound services, paid internships, and peer mentors. Assessments are critical in establishing the extent and severity of barriers to work and what alternative services or accommodations in jobs or work assignments might permit the TANF participant to engage in work, either immediately or after some other intervention.<sup>19</sup> Paid internships provide TANF participants with financial resources as well as soft and hard job skills which can be included on their resume to demonstrate their ability to learn new skills and motivation for maintaining employment. Peer mentors also play a crucial role in career pathways programs by providing encouragement, guidance, and support to TANF participants.

Dr. Peter Simon, Senior Consultant, Career Ladders Project, provided a context of program models and strategies being implemented in multiple States and specifically discussed the Career Ladders Project. The Career Ladders Project is a collaboration with California Community Colleges, provides education and career advancement opportunities through research, policy initiatives, and strategic assistance to community colleges and their workforce development partners. Career pathway education is aligned with the career pathway and incorporates the key elements listed in Figure 9.

*Figure 9: Key Elements of Career Pathway Programs*

- Educational ladder aligned with Career Ladder and Industry Certifications;
- Stackable credentials;
- Basic Skills Remediation integrated with Career-Specific Content;
- Bridge or Prep Programs lead to Credit-bearing College Classes;
- Cohort-based;
- Wrap-around Student Support Services;
- Obtainable jobs clearly defined at each step on the pathway;
- Employer Engagement (build program, develop curriculum, internships, placement; and
- Opportunities to work while going to school.

<sup>18</sup>This presentation is available on the Welfare Peer Technical Assistance Network at: <http://peerta.acf.hhs.gov/uploadedFiles/Bridge%20to%20Biotech.pdf>

<sup>19</sup> Kramer, F. D. (February 2001) Screening and Assessment for Physical and Mental Health Issues that Impact TANF Recipients' Ability to Work. *Welfare Information Network*, Issue Note 5(3).

Dr. Simon provided an overview of stackable certificates, or a clearly-defined system of competencies and industry recognized credentials linked to job opportunities and progression. A combination of at least one year of occupational training and an industry-recognized certificate has the greatest potential for incremental success and increased earnings.

Career pathways programs are effective because they accommodate the life circumstances of participants; conform to the time limits of TANF and WIA; accelerate learning by contextualizing basic skills; build on success; provide mutual support for learning through cohorts; allow participants to enter and exit programs; and align with career ladders in each pathway or sector.<sup>20</sup>

## Welfare Research, Technical Assistance, and Program Development

During this facilitated discussion, attendees engaged with panelists on developing a new framework for utilizing research and technical assistance as strategies for strengthening program activities and improving client outcomes. Attendees discussed various research tools and methodologies, as well as technical assistance options and program/infrastructure development recommendations, and provided feedback on how to ensure technical assistance relevance, effectively turning research into practice, and improving program infrastructure.

Lauren Eyster, Research Associate, The Urban Institute, provided a national perspective and facilitated a conversation encouraging meeting attendees to identify the clients their programs target and how the TANF

*Figure 10: Information Needs of Region IX States and Territory TANF Program Managers*

- Outcomes for participants who leave the TANF caseload (leavers);
- Aligning eligibility rules of SNAP and Medicaid with TANF;
- Data linking and longitudinal tracking;
- Emergency Contingency Fund outcomes;
- Behavior of participants and applicants; and
- Collaboration with partners.

program can be more responsive to their needs. Meeting attendees listed populations of interest including but not limited to refugees, persons with disabilities, domestic violence survivors, substance abusers, and individuals disconnected from welfare and work. Identifying populations of interest leads to recognition of research, program development and technical assistance needs. Based on the populations of interest listed, Ms. Eyster and meeting attendees collaborated to develop a list of what information would improve their TANF program services to the aforementioned populations (see Figure 10). In addition, Ms. Eyster outlined research resources available from The Office of Planning, Research and Evaluation and specifically discussed the SNAP Modernization Study which explores SNAP business processes, eligibility rules, and streamlining data linkage and tracking.

<sup>20</sup> This presentation is available on the Welfare Peer Technical Assistance Network at: <http://peerta.acf.hhs.gov/uploadedFiles/Peter%20Simon.pdf>

Dr. Jeanette Hercik, Vice President, ICF International identified technical assistance resources available to States and Territories and encouraged meeting attendees to share technical assistance needs (see Figure 1). The Self-Sufficiency Research Clearinghouse, funded by the Office of Planning, Research and Evaluation and launching in winter 2012, will serve as a free, “one-stop” portal for the economic self-sufficiency information needs of Federal, State, and local practitioners, policymakers, and researchers. The Welfare Peer Technical Assistance Network, funded by the Office of Family Assistance, features lessons and information gathered from the field and allows State and local practitioners to

submit requests for technical assistance. In addition to these online tools, the Office of Family Assistance is currently funding regional technical assistance initiatives as well as Promising Pathways, an initiative on practice-based evidence for program outcomes, and information gathered from the initiative will be made publically available. Based on the information needs of the requestor, technical assistance methodologies vary from exchange forums (site exchanges, roundtable forums, and site visits) to virtual Webinars, blogs, and interactive conversations to research reviews.<sup>21</sup>

Julie Gondry and Jann Donnenwirth, Program Directors, The University of California-Davis, highlighted areas of support for TANF programs that UC Davis provides to States and Tribes to improve program outcomes. These services include training for call centers, staff, and leadership; technical assistance to assess system issues and implement change; customer service training; structured programs such as supervisory effectiveness program and leadership; and coaching.

*Figure 11: Region IX State and Territory  
Technical Assistance Needs*

- Differential metrics (alternative performance measures);
- Case management strategies such as tiered approach, motivational interviewing, and comprehensive assessments;
- Connections with community colleges such as the Bridge program and stackable credentials;
- ACA integrated eligibility assessments;
- National data base current and up to date (Welfare Data Rules); and
- Electronic access to all State Work Verification Plans.

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<sup>21</sup> This presentation is available on the Welfare Peer Technical Assistance Network at: <http://peerta.acf.hhs.gov/uploadedFiles/ICF%20presentation2.pdf>

## Conclusion and Next Steps

The 2011 Region IX Innovative Solutions Workshop was effective in providing State and Territory TANF Program Administrators in Region IX with an opportunity to strategize and collaborate with their peers, ACF and OFA leadership, and national TANF researchers and experts.<sup>22</sup> During this one and a half day technical assistance activity, meeting attendees posed questions about their TANF programs and provided recommendations for TANF Reauthorization and administrative flexibility to ACF and OFA leadership. Meeting attendees also shared promising strategies in their programs to assist their peers in overcoming current challenges, and heard from national TANF experts and researchers on innovative approaches being implemented across the country. Finally, meeting attendees had an opportunity to think critically about the history of the TANF program and its future and to identify technical assistance needs. Meeting attendees were referred to resources such as the Welfare Peer Technical Assistance Network and current and recent research to address technical assistance needs.

In addition to the current, free resources available, State and Territory TANF Program Administrators will continue to participate in technical assistance activities funded by OFA. The Region IX Innovative Solutions Workshop was one of many steps in the ongoing technical assistance provided by Region IX and OFA Central Office. Additional follow-up and wrap-around support will be customized to help programs overcome programmatic obstacles identified during this activity. Working with the Region IX staff, each State and Territory will develop a targeted technical assistance strategy that is meant to ensure the effectiveness of the TANF program to respond to the needs of its participants. This is an investment in each State and county program that will build and maintain strong, in-house foundations for effective service development, administrative flexibility, and program responsiveness to improve economic self-sufficiency outcomes for low-income individuals and families.

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<sup>22</sup> The Administration for Children and Families, Office of Family Assistance, Region IX Innovative Solutions Workshop was a success in the eyes of meeting attendees who completed a survey about the technical assistance activity. They appreciated the networking opportunities and knowledge gained from the technical assistance around program improvement and best practices. Overall, as indicated by the many responses that rated the Workshop and specific session medium-high or high, survey respondents indicated that attending the Region IX 2011 Innovative Solutions Workshop was beneficial to them and taught them new information about promising programs and strategies which are applicable to their programs. Respondents noted that communicating with peers and speakers allowed them to talk openly about the changes occurring with TANF and to learn more in depth about topics such as career pathways, asset development, and services for domestic violence survivors. Many respondents indicated that they will use the information from these sessions to improve their programs and educate their staff.

(2011). *Administration for Children and Families, Office of Family Assistance, Region IX State TANF Administrators Innovative Solutions Workshop evaluation summary*. United States Department of Health and Human Services, Administration for Children and Families, Office of Family Assistance.

Appendix A: Agenda



## 2011 Innovative Solutions Workshop

Administration for Children and Families  
Office of Family Assistance, Region IX

# Agenda

### Wednesday, September 21, 2011

**Meeting Facilitators:**

Julie Fong, TANF Program Manager  
Office of Family Assistance  
Administration for Children and Families- Region IX  
US Department of Health and Human Services

Tracy Donovan, TANF Program Specialist  
Office of Family Assistance  
Administration for Children and Families- Region IX  
US Department of Health and Human Services

Damon Waters  
Technical Specialist  
ICF International

7:30 a.m. – 8:30 a.m.

Registration and Networking

8:30 a.m. – 8:45 a.m.

Welcome

Julie Fong, TANF Program Manager  
Office of Family Assistance  
Administration for Children and Families- Region IX  
US Department of Health and Human Services

8:45 a.m. – 9:15 a.m.

Greetings and Updates from Administration for Children and Families, Region IX  
and Office of Family Assistance

Sharon Fujii, Regional Administrator  
Administration for Children and Families- Region IX  
US Department of Health and Human Services

Earl S. Johnson, Ph.D., Director  
Office of Family Assistance  
Administration for Children and Families  
US Department of Health and Human Services



## 2011 Innovative Solutions Workshop

Administration for Children and Families  
Office of Family Assistance, Region IX

### Agenda

9:15 a.m. – 10:45 a.m.

#### TANF Reauthorization, Administrative Flexibility and TANF Reporting Forum

The US Congress is scheduled to reauthorize the TANF program in 2011 and TANF programs are required to report additional data under the TANF extension of 2010. During this session, attendees will have the opportunity to interact with OFA leadership about policy priorities and program recommendations for TANF Reauthorization and seek additional guidance around specific reporting requirements and administrative flexibility.

Mark H. Greenberg, Deputy Assistant Secretary for Policy  
Administration for Children and Families  
US Department of Health and Human Services

Earl S. Johnson, Ph.D., Director  
Office of Family Assistance  
Administration for Children and Families  
US Department of Health and Human Services

10:45 a.m. – 11:00 a.m.

Break

11:00 a.m. – 12:15 p.m.

#### TANF at 15: Policies, Progress, and Promise

In 1996, Congress passed the Temporary Assistance for Needy Families (TANF) program to aid low-income families in achieving greater levels of economic self-sufficiency. Although caseloads have declined and many families have moved into employment, there remain considerable challenges for many families with barriers to employment and limited access to employment. During this facilitated discussion, attendees will hear perspectives from national experts and researchers on the current status of TANF on a national level; on the prospective outlook for low-income families; and strategic recommendations for improving the effectiveness of TANF to respond to the economic self-sufficiency needs of low-income families.

Panelists: Liz Schott  
Senior Fellow  
Center on Budget and Policy Priorities

Jeanette Hercik, Ph.D.  
Vice President  
Family Self-Sufficiency  
ICF International

12:15 p.m. – 1:15 p.m.

Working Lunch



Administration for Children and Families  
Office of Family Assistance, Region IX

## Agenda

1:15 p.m. – 2:15 p.m.

### State/Territory Roundtable

In this interactive roundtable session, State attendees will provide updates on specific challenges to be addressed in delivering services to TANF families during the present economic difficulties and discuss ideas on how they may be overcome. During this moderated discussion, attendees will share innovative strategies developed at the local level to improve program effectiveness, while increasing effective client programming. From utilizing data to monitor program outcomes to new worker requirements and workload management activities to linking TANF participants to outside service providers, attendees will discuss one key strategy that has been employed that has streamlined service delivery, increased worker productivity, reduced duplication, or enhanced the TANF program experience for clients.

Topics of discussion could include:

- Engaging eligible and hard-to-serve families (e.g. Case Management and Assessment)
- Potential partnerships and collaborations
- Improving work supports
- Managing caseload increases

2:15 p.m. – 3:15 p.m.

### Reshaping Intervention, Expanding Options—Innovative Strategies for Addressing the Needs of Domestic Violence Survivors in the TANF Caseload

During this moderated discussion, attendees will hear about and discuss innovative approaches for identifying and servicing domestic violence survivors in the TANF caseload. Attendees will have additional time to engage peers and presenters on how to link community partners and resources related to domestic violence and get a better understanding of how to access and use the Online Work Readiness Assessment to assess domestic violence among low-income clients.

Panelists: Kelly Goodall  
Economic Empowerment Manager  
Coalition Against Domestic Violence

Colsaria Henderson  
Managing Advocate  
Family Violence Law Center

Claire McCullough  
Community Programs Director  
La Casa De Las Madres

3:15 p.m. – 3:30 p.m.

Break



## 2011 Innovative Solutions Workshop

Administration for Children and Families  
Office of Family Assistance, Region IX

### Agenda

3:30 p.m. – 5:00 p.m.

#### Asset Development, Financial Fitness, and TANF—Strategies for Integrating Programs and Meeting the Long-term Economic Self-Sufficiency Needs of TANF Participants

During this moderated discussion, attendees will hear about and discuss innovative strategies for improving the ability of TANF participants to improve long-term economic self-sufficiency through asset development and financial fitness. Attendees will have additional time to engage peers and presenters on how to link community partners and resources related to asset building and financial fitness.

Panelists: Sierra Solomon  
Associate  
Assets for Independence Resource Center

Nicole Levine  
Executive Director, North Bay and San Francisco  
Women's Initiative for Self Employment

Lorne Needle  
Chief Community Investment Officer  
United Way of the Bay Area

5:00 p.m. – 5:15 p.m.

#### Day One Wrap-Up and Evaluation



Administration for Children and Families  
Office of Family Assistance, Region IX

## Agenda

### Thursday, September 22, 2011

8:00 a.m. – 8:30 a.m.

Networking

8:30 a.m. – 9:00 a.m.

Day One Reflections and Day Two Visioning

9:00 a.m. – 11:00 a.m.

Strategies to Improve Career Pathways for Low-Income Workers

During this facilitated discussion, attendees will hear about and discuss strategies to increase/improve TANF work participation using innovative program strategies and services, including career pathway development, career laddering, and service coordination with community colleges and other partners. Whether it's achieving greater employment outcomes for hard to employ clients, engaging employers, or identifying additional countable activities, attendees will engage with peers and presenters on issues pertaining to work participation among TANF participants.

Panelists: Lauren Eyster  
Research Associate  
The Urban Institute

Diana Spatz  
Executive Director  
LIFETIME  
University of California, Berkeley

Peter Simon  
Senior Project Consultant  
Career Ladders Project

Carin Zimmerman, Ph.D.  
Biotechnology Instructor  
City College of San Francisco, Bridge to BioTech

11:00 a.m. – 11:15 a.m.

Break



## 2011 Innovative Solutions Workshop

Administration for Children and Families  
Office of Family Assistance, Region IX

### Agenda

11:15 a.m. – 12:45 p.m.

#### Welfare Research, Technical Assistance, and Program Development

In an effort to improve the effectiveness of various work readiness, employability, and barrier reduction strategies utilized by TANF programs, many TANF programs and stakeholders utilize research and technical assistance. During this facilitated discussion, attendees will engage panelists on developing a new framework for utilizing research and technical assistance as strategies for strengthening program activities and improving client outcomes. Attendees will learn about various research tools and methodologies, as well as technical assistance options and program/infrastructure development recommendations, and provide feedback on how to ensure technical assistance relevance, effectively turning research into practice, and improving program infrastructure.

Panelists: Lauren Eyster  
Research Associate  
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Jeanette Hercik, Ph.D.  
Vice President  
Family Self Sufficiency  
ICF International

Julie Gondry  
Program Director, Tribal TANF Programs  
The Center for Human Services, UC Davis Extension

Jann Donnenwirth  
Program Director  
The Center for Human Services, UC Davis Extension

12:45 p.m. – 1:00 p.m.

#### Wrap-up and Evaluation

Julie Fong, TANF Program Manager  
Office of Family Assistance  
Administration for Children and Families- Region IX  
US Department of Health and Human Services

Appendix B: Participant List



## 2011 Innovative Solutions Workshop

Administration for Children and Families  
Office of Family Assistance, Region IX

### Participant List

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## 2011 Innovative Solutions Workshop

Administration for Children and Families  
Office of Family Assistance, Region IX

### Participant List

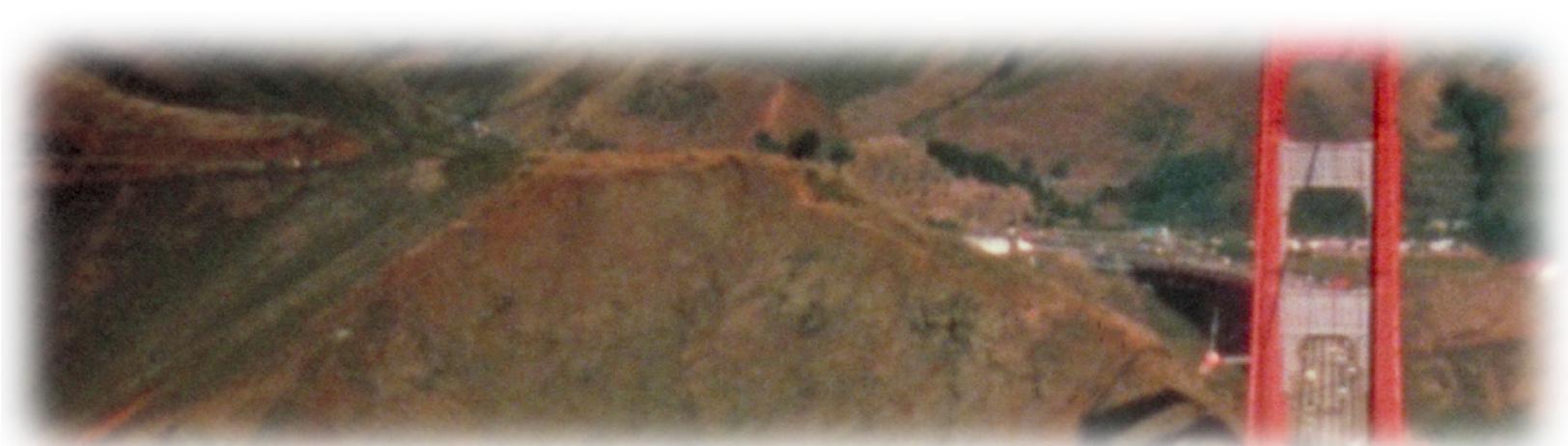
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## 2011 Innovative Solutions Workshop

Administration for Children and Families  
Office of Family Assistance, Region IX

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## 2011 Innovative Solutions Workshop

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