



# **Client Success through Partnership: 2010 State TANF and Workforce Meeting**



**Summary Report**



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## Introduction

The programs that make up the American safety net share a common set of challenges and goals. Among them is the desire to improve the ability of individuals to become economically independent, the development of viable communities, and the promotion of strong and stable families. As communities across the country move forward with multiple strategies to develop and promote increased self-sufficiency for low-income working families and to break the cycle of reliance on various forms of public assistance, there is an increased need and desire to collaborate among the various social service agencies.



This comes as no easy task for programs as they face the challenges of shrinking budgets, less staff, varied programs, and changing political landscapes that cut across agency and organizational boundaries. Addressing these challenges requires joint effort from multiple agencies and stakeholders. No single agency is specifically in charge of improving self-sufficiency among low-income families, and no single agency can fully address the confluence of challenges that communities, families, and individuals face.

States across the country are looking at new ways to integrate Temporary Assistance for Needy Families (TANF) and the Workforce Investment Act (WIA). Originally, TANF was designed to provide a broad range of services and benefits to eligible individuals and their families. States primarily focused their resources and efforts on improving the employability and employment linkage of low-income unemployed parents, while supporting their families with additional benefits. WIA was created to develop a single point of entry for both unemployed and underemployed individuals. In an effort to streamline process and reduce duplication of services, the workforce system has dedicated resources to “one stops,” which provide a vast range of employment and training programs that are linked to the workforce needs, clients, and potential employers.<sup>1</sup>

TANF's primary goal is to increase employment among TANF participants. Furthermore, an emphasis of many State and local agencies has been to improve strategies for moving participants into the job market by developing new strategies for promoting employment and earnings. According to the Assistant Secretary for Planning and Evaluation (ASPE), many states and localities have sought to improve services to TANF participants and TANF-eligible clients by working to coordinate services between TANF and WIA. Coordination between TANF and WIA has increased, but States and localities continue to experience challenges including different program definitions, reporting requirements, and varying cultures.<sup>2</sup> Increased partnership has the potential to increase efficiencies, reduce duplication, enhance information sharing, leverage resources, and extend a set of more comprehensive services to clients and communities. Even though partnership is not mandated, many localities realize the natural synergies between TANF and WIA, and have either increased partnership or started laying the foundation for more partnership.<sup>3</sup>

<sup>1</sup> See: Greenberg, Mark et al. (2004). *Integrating TANF and WIA Into a Single Workforce System: An Analysis of Legal Issues*. Center for Law and Social Policy.

<sup>2</sup> Coordination between TANF Programs and One-Stop Centers is Increasing, but Challenges Remain. (2002). General Accounting Office.

<sup>3</sup> Werner, Alan and Kendra Lodewick. (2004). *Serving TANF and Low-Income Populations through WIA One-Stop Centers*. Office of the Assistant Secretary for Planning and Evaluation, USDHHS.

## Overview of Meeting

Held July 27-29, 2010 in Dallas, Texas, the *Client Success through Partnership: 2010 TANF and Workforce Meeting* brought together more than 120 representatives from States across the South and Midwest. The meeting aimed to facilitate the exchange of promising ideas and practices to increase and improve economic and social outcomes for low-income individuals by promoting partnership among TANF, WIA, and other social service programs. The three-day meeting was sponsored by the United States Department of Health and Human Services, Administration for Children and Families (ACF) - Office of Family Assistance (OFA) Regions VI and VIII and the U.S. Department of Labor, and Employment and Training (ETA), Region IV.



The format of the meeting built on previous meetings and activities that looked specifically at collaboration, coordination, and partnership. It included sharing promising practices and a design that supported the dissemination of information between State TANF Administrators, Workforce Directors, Federal policy representatives, and other key stakeholders. Presenters were asked to provide concrete examples of effective partnerships that would help low-income populations achieve greater levels of self-sufficiency.

One of the primary goals of the meeting was to help individual States create an action plan to proactively address a partnership between TANF and WIA. The format provided an opportunity for participants to create action steps with clearly outlined objectives. A secondary goal was to introduce TANF Administrators and Workforce Managers to other Federal programs that are useful to low-income populations and shared clients. The meeting featured interactive Roundtable discussions that included representatives from each State.

## Day One

### *Concurrent Regional Meetings*

In order to understand the issues and innovations of each individual ACF Region and ETA Region IV, the meeting started with individual breakouts where attendees provided their thoughts on varying topics of importance to the specific region in which they reside. These sessions provided Regional Program Managers from three regions with the opportunity to share information on program status and any specific challenges that states may be having, while highlighting some promising program activities. The three participating regions included Administration for Children and Families – Region VI, Administration for Children and Families – Region VIII, and the U.S. Department of Labor, Employment and Training Administration, Region IV. Summaries of each individual breakout session are listed below.

#### Administration for Children and Families- Region VI TANF Administrators' Meeting

The Administration for Children and Families, Region VI (Arkansas, Louisiana, New Mexico, Oklahoma, and Texas) met to discuss issues and innovations of specific importance to the member States. Larry Brendel, TANF Program Manager- Region VI, welcomed participants to Dallas and the TANF Administrators' Meeting. Mr. Brendel began his presentation by providing an update on Region VI activities specific to implementing and supporting the American Recovery and Reinvestment Act funded projects/programs and the \$200 million in grant awards received

through the TANF Emergency Contingency Fund (ECF). He applauded the States for drawing down a significant portion for supported subsidized employment programs specifically targeted to low-income workers and TANF participants. He also commented on successes as they relate to the use of non-recurrent short-term benefits for the use in summer food programs, food banks, and other meal programs for youth and families.

Lastly, he commented on the successes in the Region as they relate to summer youth programs—particularly programs that have put youth into much needed jobs during a period with historically high unemployment rates. According to Mr. Brendel, Region VI recently conducted an internal, organizational assessment, involving ACF Regional/Central office staff and State representatives, to determine how ACF can reorganize to become more efficient and responsive.

Regional staff members are currently reviewing the recommendations from this assessment and will report to the member states once completed. Mr. Brendel also informed participants that Congress is due to reauthorize TANF in 2010 and, while offices should not expect any significant legislative motion until 2011, there are efforts to extend the TANF ECF for an additional year.

Mr. Brendel then provided additional details about the proposed Fatherhood, Marriage, and Families Innovation Fund which would provide a \$500,000,000 investment to support:

- (1) State-initiated comprehensive responsible fatherhood initiatives, including those with a marriage component, that rely on strong partnerships with community based organizations; and
- (2) State-initiated comprehensive family self-sufficiency demonstrations that seek to improve child and family outcomes by addressing the employment and self-sufficiency needs of custodial parents who face serious barriers to self-sufficiency.

The Innovation fund will seek to identify promising new approaches in areas such as:

- (1) Identifying families that have serious barriers to employment, including strategies that use mechanisms of ongoing assessment or focus on families at risk for involvement in the child welfare system;
- (2) Implementing strategies to help families address these barriers and also prepare for employment;
- (3) Promoting child well-being in highly disadvantaged families, including child-only cases; and
- (4) Supporting those with barriers who find jobs so they can sustain employment.

The goal of the Innovation Fund is to build a stronger evidence base about what service intervention models work to remove barriers to employment and increase family functioning and parenting capacity that could be replicated within the TANF, Child Support Enforcement (CSE), and other state and community-based programs. Mr. Brendel updated attendees on staff changes at the Regional and Federal levels and welcomed Earl Johnson as the newly appointed Director of the Office of Family Assistance.

Transitioning from Regional and Federal updates, Mr. Brendel asked a representative from each of the Region VI states that were in attendance to share one challenge and one promising practice from their area.

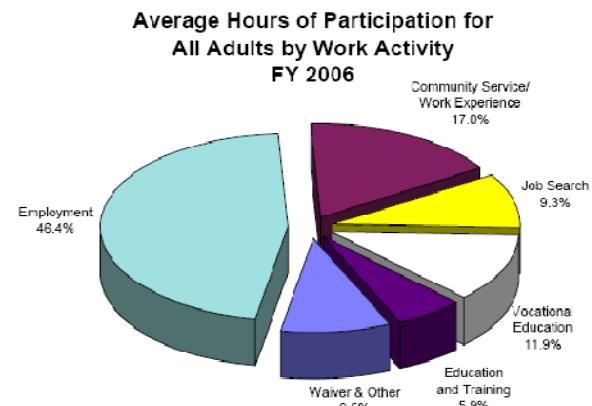
State	Challenge(s)	Promising Practice(s)
<i>Arkansas</i>	1. Completing the Tests of Adult Basic Education (TABE) Assessment within their designated timeframe. 2. Improving/increasing transportation options for TANF participants. 3. Providing comprehensive child care for families participating in work activities 4. Implementing successful and positively reinforcing TANF sanctions for participants.	Arkansas has set-up numerous Regional trainings to allow more State staff to administer the TABE Assessment.
<i>Louisiana</i>	1. Increased TANF and SNAP caseloads (on average, these caseloads have grown by 100 individuals per caseworker). 2. Service delivery challenges due to massive budget and staff cuts.	In partnership with the State's Workforce Commission, Louisiana Department of Children and Family Service piloted a TANF/SNAP combined service program that resulted in the identification of important information technology recommendations, instances of service overlap, increased employment rates, and overall, a more responsive SNAP application process.
<i>Oklahoma</i>	1. Ongoing struggles to meet Federally mandated work participation rates (WPR). 2. Insufficient resources for staff training.	The State has contracted with a local community college to conduct TANF intake assessments and this has improved the agencies' ability to identify and refer participants with learning disabilities to applicable services and activities.
<i>Texas</i>	1. Due to budget cuts in recent years, Texas lost a considerable number of staff trained to work in the TANF program.	1. Texas has designed a series of outreach materials for grandparents raising TANF-eligible grandchildren to inform them on how to apply for TANF funds. 2. Texas has also developed curricula, and held Training of Trainers events on TANF policy and practice in order to assist caseworkers and administrators who are new to the TANF program.

Prior to the 2010 meeting, Region VI TANF Administrators were asked to submit a series of questions pertaining to TANF and during this breakout session Region VI staff responded to six questions posed by states.

1. **Staffing Question:** How are States balancing low TANF caseloads (high TANF application denial rate) with increasing SNAP/Medicaid caseloads?
  - a. **Response:** Louisiana responded that, as the application number increases, so are denial rates. They are planning to implement an upfront screening tool for all public assistance programs that will inform participants of their eligibility status earlier in the application process. Louisiana also intends to implement a community partners' network that will allow other local organizations to use this screening tool. Texas responded that, in their experience, participants prefer to apply in-person

at their TANF offices, though they have also collaborated with local food banks in starting their own community partners' network. Arkansas stated that they use one application for all public assistance programs. Oklahoma has an online application form which allows participants to determine eligibility and check their application status online.

2. **Staffing Question:** Are all staff at the State level trained to work within the TANF program?
  - a. **Response:** Arkansas changed the title of all TANF caseworkers to "workforce specialists" to support program integration between TANF and WIA. In Louisiana, staff members are all eventually trained to work within any public assistance program. Training begins with SNAP, as the application rules are simpler, with TANF cash assistance taught last. Oklahoma holds an annual academy where caseworkers receive training on all public assistance programs. The State also has a curriculum set that covers the basic concepts of TANF. The States in attendance agreed that a TANF curriculum is helpful, but what is needed are modules that deal with the "intermediate/advanced" components of TANF. Arkansas stated that they are currently in talks with a local university to develop this type of curriculum.
3. **Policy/Eligibility Streamlining Question:** Are States analyzing their program policies to further streamline/simplify TANF policy and align with SNAP/Medicaid policy?
  - a. **Response:** Oklahoma has established multiple programs across a number of agencies to help facilitate policy streamlining.
4. **Budget Shortfall Question:** How are States addressing TANF budget shortfalls for the coming year?
  - a. **Response:** In an effort to assess and improve their effectiveness, Arkansas is developing an eligibility strategic plan for 2013. Oklahoma has reduced their budget by approximately 10 percent without any significant cuts to work supports. The State is hopeful that recent reductions in the TANF caseload will somewhat ease their budget constraints. Louisiana has reduced staff through layoffs and encouraging early retirement. The State has also consolidated offices to save costs.
5. **Community Service Question:** How are States adding community service (analysis by ASPE on right) components to their list of allowable work activities?
  - a. **Response:** The Texas Workforce Commission discussed their efforts in including community service as an allowable activity. Arkansas has a similar system which they describe as "work experience." A number of States responded that many potential partner agencies do not understand the difference between TANF community service and court-mandated community service.



\*For additional information on adding community service components to the list of allowable work activities refer to <http://aspe.hhs.gov/hsp/08/TANFWPR1/report.pdf>

**6. Sustaining ECF Funded Programs Questions:** How are States planning to sustain ECF funded programs once this funding is exhausted?

- a. **Response:** Arkansas has implemented primarily short-term, non-recurring benefits making long-term program sustainability less of a potential challenge. Oklahoma is offering short-term assistance while also expanding eligibility for their existing subsidized employment program to include TANF-eligible individuals. At the completion of ECF, the State will most likely only offer subsidized employment to current TANF participants.

***Region VI: TANF Rural Communities Initiative***

*Patrick Heiman, Senior Research Associate at ICF International*

Patrick Heiman, Senior Research Associate for ICF International, presented on the TANF Rural Communities Initiative that ran from 2008 to 2010. The presentation included information regarding background, goals and services provided to support the Initiative. Mr. Heiman stated that policymakers and researchers increasingly emphasize that a key to improving self-sufficiency outcomes for low-income and working families in rural communities is enhancing the ability of TANF and other social service provider's abilities to deliver effective and tailored service. The OFA Rural Communities Initiative was an innovative technical assistance initiative developed to strengthen service systems to ensure that TANF participants in rural communities receive and benefit from high quality, holistic, and family-centered supports and services.

Administered by ICF International, the Rural Communities Initiative has effectively built the capacity of State, local, and Tribal administered TANF agencies through the provision of training, technical assistance, research, and consultation on a full array of topics ranging from substance abuse to case management to economic development. Mr. Heimen discussed the targeted technical assistance that was delivered to 16 rural States, Counties, and Tribes that dealt with issues of poverty, workforce, and self-sufficiency. The goals of the Initiative were to:

- (1) support rural communities in the self-identification of their local challenges;
- (2) assist in the design of technical assistance action plans that address these issues; and
- (3) facilitate the delivery of technical assistance.

Mr. Heiman described the Initiative site selection process and reviewed the steps taken in designing each site's individualized technical assistance plan. As outlined by Mr. Heiman, each site worked with a technical assistance coordinator to secure tailored technical assistance in the areas of transportation, economic development, assets-based case management strategies, and employer engagement. The types of technical assistance offered through the Initiative included: Webinars; facilitated conference calls; site visits; site exchanges; roundtables, and; specialized research, tools, and resources. After briefly describing the types of technical assistance available through the Initiative, Mr. Heiman detailed two technical assistance events held through the Initiative:

- **Rural Transportation Roundtable (January 2009)**

The Rural Transportation Roundtable was held January 27-28, 2009 in Charleston, West Virginia. The purpose of the Rural Transportation Roundtable was for sites to learn more about additional programs in the field of rural transportation, resources on forming partnerships with local transportation stakeholders, and funding for these types of projects. Attendees included representatives from seven of the Rural Communities Initiative Sites and various content specialists.

One of the key challenges and issues facing rural TANF agencies and organizations is providing reliable and cost effective transportation. Content faculty presented on lessons learned from current rural transportation models and participants had time to engage in action planning to develop programmatic and funding solutions to rural transportation challenges. Participants also conducted a site visit to the Good News Mountaineer Garage to see their service delivery model, their facilities, and meet with staff for a question and answer session.

- **White Mountain Apache Tribal TANF Program Needs Assessment (July 2009)**

As part of their participation in the Rural Communities Initiative, the White Mountain Apache Tribal TANF Program had a site visit from Rural Communities Initiative staff and consultants from the U.C. Davis Extension at the University of California to provide the Tribe with an in-depth needs assessment in order to strategize on developing solutions for programmatic improvement. The consultants, Julie Gondry and Dr. Geni Cowan, are Tribal TANF subject matter experts with program based skills in training, case management, and data reporting. Based upon the assessment results, the White Mountain Apache Tribal TANF Program received valuable recommendations to further enhance aspects of their program's structure and administration to reach the end goal of self-sufficiency for their TANF participants.

Mr. Heiman next reviewed some of the program outcomes documented throughout the Initiative. These results showed significant increases in the capacity of TANF to identify and respond to barriers in their caseload, improvements in state and county work participation rates (WPR), an establishment of more responsive and effective programs and policies, and new collaborations that have expanded services to TANF and low-income individuals. Lastly, Mr. Heiman discussed some of the site's ongoing projects that have continued after the completion of the Initiative. These projects included North Dakota's efforts to roll out the Online Work Readiness Assessment (OWRA) tool statewide and New Mexico's Transportation Task Force which is working to provide more reliable transportation services to rural populations by better coordinating the State's transportation providers.

Following Mr. Heiman's presentation, Arkansas and Texas reflected on their experience participating in the Initiative.

**Arkansas** - The Arkansas site began their presentation by describing some geographic, economic, and population data associated with Phillips County, the focus of Arkansas' participation in the Initiative. The State discussed their TA focus areas:

- Identifying transportation solutions that assist TANF participants' access to available jobs;
- Increasing the employability of Phillips County TANF participants to improve their access to available jobs;
- Enhancing existing partnerships with Economic Development to identify future jobs;
- Providing additional educational opportunities for TANF participants to increase skill levels for placements in available jobs; and
- Establishing a subsidized employment pilot to increase available job opportunities.

In a review of their accomplishments during the Initiative, Arkansas reported that they identified a provider willing to transport participants across State lines. This transportation challenge had formerly prevented these individuals from working at a casino in Mississippi. The site discussed their partnership with the local Chamber of Commerce to help create additional job and education opportunities. Arkansas has also partnered with their

local WIA office to implement a youth summer employment program that is helping high school students develop career portfolios.

**Texas** - The Texas site focused their technical assistance interventions in Fannin County, a rural area in the northeast part of the State. The county offers few job opportunities, scarce number of employers, no access to transportation, and an unemployment rate higher than the Texas State average (9.2 percent vs. 8.3 percent). During their participation in the Initiative, Texas received technical assistance around transportation assistance for TANF participants, case management, and employer engagement. Their Initiative team was composed of partners from the Departments of Vocational Rehabilitation, Housing, TANF, and WIA. Among their achievements during the Initiative, Texas discussed their partnership with the Texoma Council of Governments and Texoma Area Paratransit Public Transit as one of their proudest accomplishments. This partnership is working to develop an overall transportation strategy for all of Fannin County. The site also mentioned increases in their two-parent families work participation rates and the implementation of a subsidized employment initiative as two other significant achievements.

#### *Region VI: ACF's Role in Emergency Preparedness and Response*

*Allen Applegate, Regional Emergency Management Specialist for ACF Region VI*

Allen Applegate, Regional Emergency Management Specialist for ACF Region VI spoke to the ACF Region VI TANF Administrators' on the potential impacts of natural disasters on low-income community residents and ACF's role in emergency preparedness and response.

Mr. Applegate began his presentation by pointing to the fact that ACF's primary stakeholders, individuals who are low-income, transportation disadvantaged, children, elderly, or disabled, because of their isolated and often vulnerable situations, are also the groups most affected by disasters. These populations also take the longest to recover from disasters. For these reasons he believed that the potential impact of disasters on the TANF program is immense. Disasters test a community's ability to cope. Natural and man-made hazards may cause shortages, challenges to infrastructure, education system crunches, and may require a community to access resources from a different state. He went on to say that requesting legal identification is often a major challenge when working with TANF and other low-income populations in times of disaster. In many cases, waivers for immediate assistance are offered for those without proper documentation.

In the last decade, Mr. Applegate noted that the most important lesson he learned from working with low-income populations and disasters is the importance of communication and cross-agency partnership. In order to establish effective collaborations agencies need to engage in dialogue pre-disaster. In support of these partnerships, and disaster relief in general, ACF provides technical assistance around disaster preparation and case management. Mr. Applegate also passed out a document on ACF's policies concerning emergency and disaster waivers and flexibilities.

## Administration for Children and Families- Region VIII TANF Administrators' Meeting

TANF Program Manager, Felicia Gaither, PhD, welcomed attendees to Dallas, introduced the Region VIII team (See Appendix) and asked everyone to introduce themselves. Dr. Gaither formally introduced the new OFA Director, Dr. Earl Johnson and reviewed the most recent ACF organizational chart. She announced that David Hansell was now the acting Assistant Secretary of ACF. She repeated a focus of the new Administration and instituted by outgoing Assistant Secretary Nazario and incoming acting Assistant Secretary Hansell that seeks to increase interoperability among ACF offices with the desired outcome of improving collaboration and outcomes for individuals, families, and communities.

Dr. Earl Johnson was senior Policy Advisor to Oakland, California Mayor Ron Dellums, where he was responsible for helping set policy and program goals for the city in the areas of workforce, health and urban affairs. He also worked with the White House Office of Faith-Based and Neighborhood Partnerships on fatherhood initiatives.

Before serving in Oakland he had significant state and nonprofit sector experience, having served as Associate Secretary for Planning and Evaluation in the California Health and Human Services Agency, as Associate Director, Working Communities for the Rockefeller Foundation, and as Senior Program Officer for The California Endowment, a private statewide health foundation.

Dr. Johnson graduated from the American University in Washington and earned a Master of Arts in Public Policy from the University of Chicago and a Ph.D in Social Welfare from the University of California. He is widely known for his work in developing programs and policy on matters related to TANF and has authored articles on needy family issues. His areas of expertise include poverty and fatherhood, both high priority issues for the Administration and HHS.

(ECF), Dr. Gaither sought to understand where Region VIII States stood with regard to programs and policy and she facilitated a brief discussion on possible program extensions under ARRA. Although the ARRA extension has not passed the entire Congress, she highlighted program successes from five of the six Region VIII States that have received ARRA funds.

As State budgets tighten and restrictions on travel increase, Dr. Gaither asked attendees what kind of meeting they were interested in going forward—bi-regional, multi-regional meetings or smaller strategic meetings within the region. In order to maximize resources, she wants to hear directly from region members what type(s) of meeting(s) make more sense, and would be most beneficial. Most attendees agreed that meeting was important, but the majority also felt that the meetings need to remain purposeful and allow ample time to improve service collaboration and delivery. A major partner would be workforce, but some mentioned that SNAP, Medicaid and other programs that fall within

Dr. Gaither reiterated the commitment of ACF to fatherhood and stated that, although funds are being tweaked, ACF is looking at the domestic violence initiatives and Responsible Fatherhood and Healthy Marriage initiatives and how they intersect. She provided a brief update on TANF reauthorization and although there was little to report, the Administration is looking to hear from States and localities about priorities while the White House and Congress discuss other initiatives and the likely continuing resolution that would maintain TANF programs until a new bill is passed. Moreover, she briefly touched on the reauthorization of WIA and stated that she had not yet seen a proposed reauthorization bill and that she did not believe Congress would have one that could be debated and passed by September 2010.

With the end of the American Recovery and Reinvestment Act of 2009 (ARRA)- TANF Emergency Contingency Fund

In March 2010 President Obama signed into law the landmark Patient Protection and Affordable Care Act which is meant to increase the ability of Americans to gain and afford healthcare. As the nation transitions into a new era that increases access to hundreds of thousands of Americans, workforce and service agencies are beginning to partner with healthcare officials to assure an adequate healthcare workforce. According to the US Bureau of Health professionals the nation is mired in an estimated shortage of more than 400,000 nurses and the American Hospital Association calculates 116,000 registered nurse positions are unfilled at US hospitals and 100,000 jobs are vacant at nursing centers. With the aging of the baby boomer generation, the Bureau of Labor Statistics estimates that hundreds of thousands of medical professionals will be needed to respond to the 78 million plus retirees who will need long-term care. Moreover, the absence of qualified workers in the healthcare field threatens the quality and availability of medical care.

agencies would be beneficial because it allows programs to streamline eligibility and leverage resources to establish eligibility. The attendees felt that the innovation may be more with Medicaid than the federal SNAP programs and many agreed that Medicaid and SNAP can be looked at as transitional programs out of poverty and would be great partners. The attendees believed that a potential meeting should focus on healthcare reform and how that fits in the transition of people moving to work. An important question was posed for Region VIII that specifically looked at improving the ability of TANF programs to assist TANF participants in terms of health care career pathways.

Subsidized employment has become an effective employment strategy for low-income families for many years and has increased in importance since the beginning of the recession and the passage of the American Recovery and Reinvestment Act of 2009 (ARRA). The attendees were very interested in discussing innovations and strategies within the region to increase subsidized employment opportunities and enhance subsidized employment programs. The following highlights each area.

The Texas program from Region VI was particularly interesting because it focuses on those in the Unemployment Insurance system, those transitioning off of Unemployment Insurance, and youth. For youth specifically, the unemployment rate is very high in many locations. Therefore, focusing subsidized employment on youth is a good strategy for improving employment outcomes for a population that is disproportionately impacted by the high unemployment rates.

In Utah, unemployment has increased significantly and men have been hit hardest. Therefore, the state is focusing on improving subsidized employment opportunities for varying groups and expanding to the cash assistance customer as they work out technical difficulties. Moreover, employer engagement remains a challenge across the region and even though subsidized employment is seen as an excellent resource, it does come with its challenges. Large and complicated employment agreements lead the list in challenges. The processing of 1099s was also noted as a presenting problem that needs to be simplified.

The Montana program has adopted an innovative strategy by having their TANF program act as the employer of record. They are using their existing work contractors and being somewhat selective in their selection of participants in the program. They are currently using the prevailing wage for participants in those positions. While the program has capacity for several thousand participants, the program is not statewide and there is currently state law that makes participants ineligible/exempt from unemployment insurance. For those found ineligible, this program is maintaining an active cash assistance and diversion program for families that may not qualify for the subsidized employment program.

Businesses that hire new employees may qualify for two tax incentives under the HIRE Act. Businesses that hire new employees will not have to pay the employer's share of Social Security tax (6.2% of wages) from the date of hire through the end of 2010. Additionally, businesses that retain a newly hired employee for at least 52 consecutive weeks can qualify for a tax credit of up to \$1,000.

One attendee mentioned that the program currently in place in his state served participants at 150% of poverty and had a program specifically targeted to summer youth employment. The state coordinated activities with their WIA partners and took full advantage of the ACF approved match authority of 25% for training, supervision, and administration. The TANF program diligently figured out the formula and the value of each job and decided that it would

be more conducive to have WIA serve as the employer of record—paying the wages and being reimbursed by the TANF program. Labor knows the employer and they are recruiting participants and the program has filled 116 employee slots of the available 600. Although subsidized employment differs from the TANF definition and the WIA

definition because often WIA jumps immediately to On the Job Training, workforce partners can be strategic and successful.

The North Dakota subsidized employment program is similar to the Montana program and provides a direct subsidy to the employer who in-turn pays the employee.

Innovative strategies mentioned by attendees included:

- Graduated wage increases for participants;
- Leveraging WIA and Wagner/Peyser funds for additional employment and training supports to pay for the salaries of staff who find and work with employers to take subsidized customers;
- Constantly collecting data and tracking participant outcomes;
- Having a sliding timeline that allows participants longer [or shorter] periods depending on their needs;
- Providing wrap around services and case maintenance that gauges where participants are with regard to their skill base;
- Utilizing available tax credits in concert with subsidized employment outreach;
- Varying age requirements for summer youth employment programs i.e., 16-19 in Montana and 16-24 in Wyoming; and
- Maintaining strong fiscal and program reporting structures depending on funding stream. Under ARRA, lead agencies or programs that receive CCDF ARRA funds are responsible for reporting information required by Section 1512, but lead agencies with ARRA awards of less than \$25,000 are not required to file a Section 1512.<sup>4</sup>

During this Region VIII meeting Dr. Gaither reminded the states to update their State plans with anything that will be new and different, including any additional activities that may have been funded under ARRA. She wanted to make certain that the states are ready for any potential audits.

A question was asked with regard to housing programs funded through ARRA and one attendee mentioned that the state had contracted with the Department of Local Affairs. They leveraged local partnerships and received special federal waivers to expend additional funds and also drew down the maximum amount of ARRA funds to enhance the program. Dr. Gaither reminded attendees of the joint letter (<http://www.endhomelessness.org/content/article/detail/3176>) from HHS and HUD for the rapid housing program and using TANF funds for housing assistance. She further encouraged attendees to speak with HUD regional reps and onsite HUD representatives at the meeting.

One attendee asked the group about summer feeding programs. Under the non-recurrent short-term benefits category of ARRA summer feeding programs that are widely used by several states can be funded. HHS and USDA issued a joint letter ([http://www.acf.hhs.gov/programs/dfa/policy/colleague-ltr/2010\\_TANF-SFSP\\_Dear\\_Colleague.html](http://www.acf.hhs.gov/programs/dfa/policy/colleague-ltr/2010_TANF-SFSP_Dear_Colleague.html)) outlining the program and the uses of TANF funds for such programming. Despite challenges, one site mentioned that the program was fairly successful and the state allocated \$242,000 in funding for the program. Some of the states within the region attempted summer food programs, but it was a lot of work for a small amount of money and some programs were focused on staffing and administration. Successful programs worked with a nonprofit that helped facilitate the process and streamlined the allowable expenses arena.

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<sup>4</sup> Footnote: See: <http://www.acf.hhs.gov/programs/cbb/initiatives/arra/1512/index.htm>.

## *Utah TANF Population Research Study*

*Dr. Mary Beth Vogel-Ferguson*

Dr. Mary Beth Vogel-Ferguson opened with dialogue surrounding her lead research role on the TANF population in Utah. The primary focus of the research was on long-term participants. Researchers were interested in looking at population characteristics, economic tendencies, behaviors, and family structures. The state hopes to use the information gathered to better understand how to serve the TANF population and how to tailor programs to the specific needs of different groups.

Dr. Ferguson presented a PowerPoint presentation on her research findings, including outcomes. From the research perspective, delivering services to low-income and working populations encompasses many facets and requires an understanding of programs that look inward from the agency leadership, perhaps even to frontline workers. Research has shown that feedback from the customer (TANF participant) was missing from the equation and this research looks at service delivery from the perspective of the client.

### Key research findings:

- Number one factor to success—dedicated employment counselor. Financial incentive was second.
- Intensive case management is key.
- Mandatory participation.
- Getting DWS workers not trained on the participation rate to let their clients into increased education and training.
- Department of Education is an essential partner.
- Improved worker morale and customer self-worth.
- Caseworker/customer relations is key.
- Program design should allow best efforts of customer and worker to work together.
- Strict, but flexible time limits—usually 36 months—that provide an incentive for clients to progress. Intensive/short term wrap around and transitional services.
- Effective use of client data in program.

Dr. Ferguson's research started in the late 1990s with participants who were timing off of TANF and the data showed that there is a high concentration of the hard to serve remaining on the caseload. An important distinction about Utah is that there is a 36 month time limit and it was important to determine what the impacts are and how many people hit the time limit. Utah also has universal participation so there is no exception for any customer. The research started with a sample of 1,144 persons and the goal of the research was to end up with a sample that could be compared to a non-investigative group. The research was done in a cross section of areas and particular attention was paid to rural communities.

The research found that the average age of participants was comparatively lower than the national average and the average family size for the TANF population is smaller than the national regular family average size. Unfortunately, many of the stereotypes of welfare recipients get translated into policy, representing 16% of the people who were actually served. Moreover, the longitudinal analysis ended before the depression hit, failing to reflect the recent applicants, where 50% have lost a job or had a change in their income.

The research also found that customer characteristics vary greatly and most people come in because of a crisis or a precipitating event. Researchers were also interested in understanding how people felt when they had to walk in for cash assistance. Responses varied with about 1/3 of customers coming to offices looking for a connection to a job and nothing else. Additional analysis found that relationships with frontline workers are the primary element that leads to a positive outcome. The average hourly wage—\$10.57—was influenced by minimum wage and less than half of the people were making income above the poverty line. About 20% of participants are just not connecting with any resources and the vast majority of recipients are not coming back for additional services or help.

After 14 years of welfare reform, there have been significant gains with regard to TANF caseloads. The welfare community is seeing different patterns for the length of time before TANF participants come back on the rolls. The average number of months is eight months. If they did have an episode where they came back, the average gap was nine months. Though not typical, the second episode averaged five months in length and gets longer over time.

People who are in school when they first get cash assistance are more likely to stay on the program longer. Almost half of participants have work ready skills when they start. Unfortunately, many programs are not designed for TANF participants with these characteristics and needs, but are more designed for the hard to serve. The research has found that there is a lot that has to do with the perceptions of client barriers—like lack of child care and no jobs available—that prevent people from moving back into employment. Also, her research has shown that there are often times physical health issues that require additional attention and focus. As a result, she recommends that agencies focus increased attention on extensive—and applicable—assessments for those with barriers to employment. Her research has found that there is no relationship to the number of barriers someone has to how long they are on cash assistance, but it shows that most of those with multiple barriers are being sanctioned out of the caseload.

Dr. Ferguson highlighted some key program components of the Utah program. Specifically, she reiterated the importance of client engagement and supports. Moreover, the state implemented a transitional cash assistance program that provides a “bridge transition from welfare to work” coupled with ongoing case management. Utah developed an Education Pilot Program entitled (Inve\$t in You) that looked at the long term impact of education on a family and focused services on increasing adult education. Additionally, the pilot program offered a financial incentive -\$1,500- for completion of a GED. An important component of the pilot was the improvement in the use of client data to design program components, resulting in almost half of the participants graduating from the program.

### ***Montana TANF Program***

*Del Bock, TANF Program Manager*

Del Bock, TANF Program Manager for Montana, gave a brief presentation on the Montana TANF program and its focus on staff development and training, which is a key to success. Management all went through Imagine 21 training that increased effectiveness among the team and developed a core group of trainers who then trained staff on service excellence and personal development. Although some people resigned after the training because it allowed them to determine personal and professional goals, it was a beneficial resource for effecting change among staff and client services. Additionally, Montana staff is using the Steps program which teaches the steps to economic and personal success and is developed by Pacific Institute. Others use Working It Out and still others use a combination of programs called Common Sense. The Working It Out training focuses on soft skill development, understanding conflict, the power of personal beliefs, keys to improving assertiveness, and time management training. The Steps training focuses on the “investment in excellence” and is tailored to improve self esteem and self-confidence.

### ***Diamond Standard and Dovetail Consulting***

*Kevin Richards, Division Director – Colorado Works*

Kevin Richards, Division Director- Colorado Works, presented on the Diamond Standard and Dovetail Consulting and how Colorado has integrated them into services for clients. The Diamond Standard has been used in several counties and is very complementary to the programs and provides wrap-around program support. It is designed to equip emerging adults—ages 15-25—with key skills and provides some valuable information to improve outcomes. It enhances the case management and client support experience by focusing on the “whole person” while tailoring

future planning to potential next steps for a client's future. Additionally, it covers healthy relationships, emotional intelligence, social networking, and resource development strategies for success. The program was developed by a nonprofit organization and includes a student manual that can be used for self-discovery.

Dovetail Consulting has a different business model as it is a for-profit business which provides services focused on critical thinking, healthy relationships, and changing perspectives from failure thinking to possibility thinking. It introduces the one-eighth inch principle which helps participants discover the importance of being on target for their lives. El Paso County has had a connection with Dovetail Consulting for some time and had some interesting outcomes—including an increase in work participation rates (WPR). The increase in WPR has happened through this more saturated model because clients "catch the dream" and have a tool to do something with their lives. Moreover, clients are more connected to their case manager and receive increased services that are tailored to their individual needs. In Prowers County they were looking for the most promising strategy for improving client outcomes only to find out that it was the client and their commitment to their success. Some keys to success when working with clients includes:

- Providing clients with the tools to move forward in their lives;
- Working with clients to enhance their ability to determine appropriate next steps toward the building of where they want to go in their careers; and
- Focusing on personal development.

### Employment and Training Administration- Region IV Workforce Directors' Meeting

Frank Stluka, Division Chief, ETA Region IV led a Workforce Directors' Meeting focused on the importance of partnering with TANF programs in order to meet the needs of low-income individuals. The presenter explained that low-income individuals often lack supportive services and "basic needs" such as transportation and telephone services. Because of this, it is difficult for this population to find and keep jobs. WIA offices do not have the budgets to provide supportive services to participants with barriers, so partnering with TANF agencies is necessary. There are two primary target groups: those most in need that have not been able to hold down a good job, and reemployment for people who have held jobs but have been laid off.

### *Overview of ETA Priorities and Initiatives – Regional Office Updates*

Rebecca Sarmiento, the State Liaison for Texas and Reemployment stated that in regards to ARRA expenditures for Wagner-Peyser, states in ETA Region IV for the most part are expending funds, but some states are low. The regional office and Federal Project Officers will be contacting individual states. Ms. Sarmiento also highlighted the Community of Practice under Workforce3One. Kajuana Donahue, the State Liaison for Arkansas, discussed the Rapid Response Initiative. Because of the current economic condition, Region IV will place more emphasis on Rapid Response to ensure that the services provided are timely and consistent. There will be a Rapid Response meeting in the fall of 2010. The Region has also done two case management trainings this year; one in Arkansas and one in Oklahoma.

Cynthia Green, the State Liaison for Utah discussed trade and the Work Opportunity Tax Credit (WOTC). There are 545 trade petitions in Region IV, so a focus on case management is critical for trade and job descriptions.

Carolyn Marshall, Division of Workforce Investment, discussed the Department of Naval Junior Reserve Officers Training Corps (NJROTC), Youth in the Workplace awards, which have been awarded to Colorado, New Mexico, and South Dakota. She also talked about "On the Job Training Programs" (OJTP) and the OJTP toolkit that was recently designed and put together by Maher and Maher. Ms. Marshall then discussed the On the Job Training (OJT) Training and Employment Guidance Letter (TEGL), which provides guidance to states that are considering implementing subsidized work-based training initiatives for unemployed workers.

Bill Martin, of the Division of Workforce Investment, provided an update on Emergency Relief funds. He stated that there are eight National Emergency Grants over \$50 million. These grants provide resources to states and workforce investment boards to assist them in rapidly reemploying laid-off workers through training focused on occupational skills.

Finally, Cathie Fern of the Division of Workforce Investment reinforced the importance of TEGLs. She recommended that when looking at TEGLs, directors should refer to joint letters including the letter on Green Initiatives. Ms. Fern also brought up Region IV's work with the Interagency Council to End Homelessness.

### ***State of the State Updates and Requests for Assistance***

Following this overview, states were asked to provide updates on their current efforts and requests for assistance.

**Utah:** Utah has reorganized its workforce development system to focus around the concept of demand-driven. The state is focused on working with partners and employers by asking them what they need. This assists them in understanding needed resources and in developing training programs. Utah is currently providing training for workforce development specialists, especially around engaging employers. The State has also recently received energy grants which will be launched in local schools. Lastly, the State is focus on securing TANF and Reemployment funds that target youth and those recently laid off to help get those individuals back into the workforce.

**Louisiana:** Louisiana is currently looking for best practices in the Community Service Block Grant (CSBG) Program, TANF, and WIA. The State is focused on its Louisiana Rehabilitation Services (LRS) Vocation Rehabilitation Program, a one-stop career development program that offers job search and job skills training to individuals with disabilities. The program's overall focus is to assist this population in not just getting a job but in keeping that job and in developing a lifetime career. The state has also received an "On the Job Training" grant. Finally, Louisiana is working on dealing with the oil spill crisis and its effect on special populations.

### ***Long Term Coalition Building to Serve Those Most in Need: Partnering with Community & Faith-Based Organizations***

Larry James of Central Dallas Ministries and Reverend Jay Cole, of Crossroads Community Services, First United Methodist Church presented on the importance of partnering with community and faith-based organizations in order to better service those in need.

Mr. James discussed the importance of collaboration. Government agencies and community and faith-based organizations must coordinate services and cooperate with their partners. Another important factor in partnering is creativity. When partnering, agencies must think beyond the normal structure. Last, Mr. James discussed community: the work is all about the children and families.

Reverend Jay Cole of Crossroads Community Services discussed his organization's Food Bank project as an example of successful collaboration. The Food Bank distributed over four million pounds of food last year and experienced a success rate of 33 percent.

### ***TANF and Workforce Services: The Importance of Partnership***

*Presented By: Michael Thurmond, Georgia Department of Labor Commissioner*

Georgia Department of Labor Commissioner Michael Thurmond spoke to *all* attendees during a working lunch which took place midway through concurrent Regional Meetings. Mr. Thurmond discussed the important role TANF caseworkers play in the lives of low-income families nationwide. He reminded everyone that, while TANF caseworkers cannot help every person, save every child, or find employment for every TANF participant, what separates TANF caseworkers from others is that they try. Returning to the theme of partnerships and collaboration, Mr. Thurmond explained how TANF participants are not interested in the minutia of the "TANF, WIA, and SNAP alphabet soup." He said caseworkers and administrators have to be willing to cross party, racial, and poverty lines and love TANF families enough to let other agencies receive credit. Mr. Thurmond added that a successful collaboration is only possible if all partners speak a common language and find a means for everyone to benefit. He closed by asking attendees not to allow fears to overpower their dreams.

### ***Concurrent Topical Presentations***

During the mid-afternoon, all attendees participated in one of two individual breakout sessions. The purpose of these two sessions was to provide an overview of the objectives and desired outcomes of TANF to Workforce Staff and to provide an overview of WIA to TANF Staff. Each session included presentations from key individuals in each area and a summary of each session is outlined below.

#### **TANF 101 for Workforce Staff**

*Dr. Felicia Gaither, Region VIII TANF Program Manager and Charlotte Bristow, Region VI TANF Specialist*

The statutory purpose of TANF is to increase state flexibility in meeting four goals:

1. To provide assistance to needy families with children so that they can live in their own home or the homes of relatives;
2. To end the dependency of needy parents on government benefits through work, job preparation, and marriage;
3. To reduce the incidence of out-of-wedlock pregnancies; and
4. To promote the formation and maintenance of two-parent families.

States may use TANF funds in any manner "reasonably calculated" to achieve any of these goals.

Dr. Felicia Gaither, Region VIII TANF Program Manager, and Charlotte Bristow, Region VI TANF Specialist, provided an overview of the TANF program for the WIA partners participating in the meeting. The objective of the session was to give WIA partners information about TANF to help them better understand how the two programs might be coordinated in order to allow more comprehensive services to clients. The presentation included a brief history of the statutory changes that have occurred since enactment of the Personal Responsibility and Work Opportunities Reconciliation Act (PRWORA) of 1986.

The Temporary Assistance for Needy Families (TANF) block grant provides federal funding to states for a wide range of benefits and activities. It is best known as the major source of funding for cash welfare for needy families with children, with federal requirements about work and time limits for families receiving assistance. Federal law also permits other benefits and services to be provided to low-income families with children or other activities supporting program goals of reducing out-of-wedlock pregnancies and promoting formation and maintenance of two-parent families.

Each state is required to establish a State TANF Plan, and States need to renew these periodically. If a state makes changes to the program, it should amend the TANF plan promptly. Many States post their TANF plans on their Web sites. In addition to the State Plan, each state has an approved Work Verification Plan, which describes the work activities included in the state's program and outlines the state's procedures for verifying and documenting clients' work activities.

The TANF block grant program has an annual cost-sharing requirement, referred to as "maintenance of effort," or "MOE." Every fiscal year, each State must spend a certain minimum amount of its own money to help eligible families in ways that are consistent with the purposes of the TANF program. The required MOE amount is based on an "applicable percentage" of the State's (nonfederal) expenditures on AFDC and the AFDC-related programs in 1994. The applicable percentage depends on whether the State meets its minimum work participation rate requirements for that fiscal year. A State that does not meet the minimum work participation rate requirements must spend at least 80 percent of the amount it spent in 1994. A State that meets its minimum work participation rate requirements must spend at least 75 percent of the amount it spent in 1994. In addition to the federal TANF block grant funding, needy States with economic problems may request Federal funds from the Contingency Fund. State funds must be spent on eligible families, and qualified activities include cash assistance, child care, administration, and services or benefits that accomplish a TANF purpose.

The primary performance measure under TANF is the Work Participation Rate target. In general, TANF participants must engage in work activities within 24 months of TANF enrollment. To count in a State's Work Participation Rate, single parents must average 30 hours of work activity a week and 2 parent families must have 35 hours. If federal child care is provided, the requirement is 55 hours for the couple. If a single parent has a child under age 6, the requirement is 20 hours. Failure to work can result in benefit reduction, and many states remove the parents' portion of the grant and just pay for the children—partial family sanctioning. The target work participation rate is 50 percent for all families and 90 percent for two-parent families.

TANF law lists 12 categories of work activities that states may include in their work programs to count toward work participation rates. The 12 listed categories are for core activities: (1) unsubsidized employment; (2) subsidized private sector employment; (3) subsidized public sector employment; (4) work experience; (5) on-the-job training; (6) job search and job readiness assistance; (7) community services programs; and (8) vocational educational training. Non-core activities include: (9) job skills training directly related to employment; (10) education directly related to employment (for those without a high school degree or equivalent); (11) satisfactory attendance at a secondary school; and (12) provision of child care to a participant of a community service program.

The Deficit Reduction Act (DRA) of 2005 reauthorized the TANF program through fiscal year 2010 and included provisions to place a greater emphasis on the work activities. The DRA required more supervision of unpaid work activities, and the caseload reduction credits were recalibrated. Additionally, DRA established two new discretionary grants for Healthy Marriage and Responsible Fatherhood programs for \$100 and \$50 million, respectively. Although both of those Initiatives are set to expire, the Obama Administration has expressed support for the Responsible Fatherhood Initiative.

Pursuant to the American Recovery and Reinvestment Act of 2009 (ARRA), the U.S. Department of Health and Human Services (HHS) announced the availability of up to an additional \$5 billion in emergency funding for the Temporary Assistance for Needy Families (TANF) program. This new Emergency Fund was available in fiscal years 2009 and 2010 to help states serve more families under three categories: (1) basic assistance, (2) non-recurring short-term assistance, and (3) subsidized employment. The Emergency Fund is intended to build upon and renew the principles of work and responsibility that underlie successful welfare reform initiatives. Like other provisions of the Recovery Act, the Emergency Fund provides resources to States, Territories, and Tribes to support work and families during this difficult economic period. ARRA also extended supplemental grants for population increases for the 17 states that have been receiving supplemental grants since 1997.

For subsidized employment projects funded by ARRA, the Administration for Children and Families and the Employment and Training Administration encouraged states to coordinate their TANF and Workforce efforts in order to provide the optimum services to clients.

Dr. Gaither and Ms. Bristow responded to questions about the TANF Emergency Fund and addressed potential sources of misunderstanding between the TANF and Workforce agencies. Work activities that sound similar have different definitions under the two programs. For example, under the TANF Emergency Fund, states could apply for reimbursement if they increased expenditures in the area of subsidized employment, as defined in the TANF program. Subsidized employment is similar to on-the-job-training (OJT), as defined under WIA. For TANF purposes, subsidized employment and OJT are two separate activities, and the TANF regulations were written so that the two terms would not overlap.

DOL staff commented that they are comparing definitions from one system to another. According to DOL-ETA, OJT means training by an employer that is provided to a paid participant while engaged in productive work in a job that: (a) provides knowledge or skill essential to the full and adequate performance of the job; and (b) provides reimbursement to the employer of up to 50 percent of the wage rate of the participant, for the extraordinary costs of providing the training and additional supervision related to the participant is being trained, taking into account the content of the training, the prior work experience of the participant, and the service strategy of the participant, as appropriate. Usually in the OJT agreement, there is a promise on the part of the employer to hire the trainee upon successful completion of the training. So one is focused mostly on the *employment*, while the other is focused primarily on the *training*.

**Question:** So what is work experience and how does it match with TANF?

**Response:** According to Dr. Gaither, work experience is an allowable TANF work activity, but it is not the same as subsidized employment. Under TANF, work experience is an unpaid work activity performed while the client receives a monthly TANF payment. The activity provides an individual with an opportunity to acquire the general skills and work habits necessary to obtain employment. Under regular TANF this activity is primarily centered on improving the employability of those who cannot find regular employment. In some states it is referred to as "workfare" because the activity is performed in return for the TANF grant, and participants do not receive wages or compensation.

**Question:** How are entities doing these summer youth programs and paying for it with TANF dollars?

**Response:** Felicia: The idea is that the youth are receiving a paycheck from the employer. TANF Emergency funds are used to reimburse the agency for the cost of the subsidy paid to the employer. On Jan. 19, 2010, ETA and HHS issued a joint Training and Employment Notice (No.

24-09)<sup>5</sup> that encouraged TANF and WIA partners to work together to improve employment for young, low-income participants by leveraging ARRA dollars to supplant expended WIA summer youth employment funds. Partners have the opportunity to expand subsidized employment programs. Moreover, by augmenting WIA youth funds, WIA ARRA youth funds, and TANF youth development funds with TANF Emergency Contingency Funds, there is an expectation that more youth will be served through training and employment services that include career guidance, skill assessments, case management, supportive services, basic skills and literacy training, and occupational training. Additionally, specific WIA youth services like work experience, leadership development opportunities and mentoring increase employment prospects for low-income youth. By partnering, WIA and TANF can make a real difference in the lives of many youth; not only to give them useful work experience and income over the summer months, but to help prepare them to be successful in the labor market in the future.

**Question:** Are you saying that these summer TANF kids are getting a paycheck from the employer?

**Response:** Yes

**Question:** What is the deal with overtime because you are saying they are supposed to be treated like a regular employee, but for the people who worked overtime it was kicked back?

**Response:** According to Dr. Gaither, if the employer would normally pay overtime, then states can allow for overtime. States have to determine if they will pay overtime and if it was not accepted, it may have been another issue or not accepted by that state. Ms. Bristow added that that may be a question of what the State has agreed to with the employer.

Dr. Gaither and Ms. Bristow concluded their remarks by outlining the requirements to apply for funds. Specifically, if a State wants to apply for funds for previous FY 2009 or 2010 expenditures, they can do that at any time. All new Emergency Fund applications are due by Sept 1, 2010. All expenditures have to be spent by Sept. 30, 2010. Therefore, if a program has youth/adults in subsidized employment placements they can work until 11:59 pm Sept 30, 2010. They will be paid for that time even if the program does not pay them until October 10. Because they did the work in September, the agency can be reimbursed. However, the labor of doing the payroll cannot be charged to the Emergency Fund, but can be charged to regular TANF. States and Tribes apply for Emergency Funds based on estimated expenditures, and they need to update the OFA-100 with actual expenditure data in subsequent quarters for FY 2009 and 2010.

**Question:** Is it the case that States can spend money through Dec. 31, 2010?

**Response:** States that are awarded TANF Emergency Funds as reimbursement for earlier expenditures may spend the Emergency funds at any time and on any allowable TANF activity. If the State was awarded TANF Emergency funds based on a projection of future spending in 2009 or 2010, then those funds must be expended by September 30, 2010.

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<sup>5</sup> <http://wdr.doleta.gov/directives/attach/TEN/ten2009/ten24-09.pdf>

## Workforce 101 for TANF Staff

*Kajuana Donahue and Rebecca Sarmiento, U.S. Department of Labor, Employment and Training Administration*

Kajuana Donahue and Rebecca Sarmiento, workforce development specialists from the U.S. Department of Labor, Employment and Training Administration, Region IV, spoke to a group of TANF professionals on basic principles of the Workforce Investment Act (WIA) system. Ms. Donahue and Ms. Sarmiento began their presentation by reviewing the five key principles of the WIA system: (1) streamlining services (e.g. one-stop system); (2) empowering individuals; (3) universal access; (4) increased accountability; and (5) State and local flexibility.

In terms of governance structure, WIA is comprised of State Workforce Investment Boards, local Workforce Investment Boards, and one-stop systems. The State Board is responsible for the development of a statewide workforce vision, conducts performance accountability and workforce plan modification, and also designates local Workforce Investment areas. Local Workforce Investment Boards are established in each local workforce investment area. Board members are appointed by chief local elected officials and the chair must represent the private sector. The roles for Local Boards include the development of local strategic plans, the selection of one-stop operators and other service providers, and budget administration. Both speakers described the one-stop system as the cornerstone of WIA. One-stop centers provide a variety of services to assist individuals to meet their employment and training needs, while also assisting local employers to meet their needs for qualified personnel. Each State is required to have at least one comprehensive center that is physically located in each local service delivery area.

After providing an initial overview of the WIA system, Ms. Donahue and Ms. Sarmiento described how WIA works within three distinct funding streams: (1) adult programs; (2) dislocated worker programs; and (3) youth programs. Eligibility criteria for these programs are based primarily on age and income level. In the case of the Dislocated Worker Program, eligibility is also established in cases where an individual is unemployed as a result of natural disasters. To support those affected by natural and man-made hazards, WIA offers National Emergency Grants (NEG) to supplement workers' lost wages and Rapid Response services to help individuals transition into new employment. Across both the Adult and DW Programs, WIA provides intake, skills assessment, job search and placement, career counseling, individual employment plan development, job readiness training, skill upgrading, adult education, entrepreneurial training, transportation and child care assistance, and placement in short-term, prevocational services. In many cases, training services are provided by outside experts. These providers may include postsecondary education institutes, entities that implement programs under the Apprenticeship Act, or other public or private training providers. The Youth Program assists individuals, aged 14-21, in accessing education, housing, job training, and other supports critical to obtaining self-sufficiency. Youth services may also include tutoring, study skills training, occupational learning, and leadership development.

Ms. Donahue and Ms. Sarmiento concluded their presentation by stating how WIA monitors and promotes performance accountability through State and local performance measures, ongoing reports and evaluations, and the establishment of incentives and sanctions. In response to one attendee's question on how WIB regions are selected, Ms. Donahue responded that State governors designate what is a WIB "area".

## Administrative Guidance

Meeting attendees were reconvened to participate in a session on administrative guidance. This session provided information on administrative needs such as memoranda of understanding, cost allocation, tracking of fund usage and participant activity, maintenance of effort requirements, grants administration, and program accountability. John Allen and Charlie Watts, U.S. Department of Labor, Employment and Training Administration, presented on grant management, Memorandums of Understanding (MOU), and financial controls. Janice Caldwell, Regional Grants Management Department, presented on the various types of TANF Funds, Maintenance of Efforts (MOE) requirements, and other TANF related regulations. Summaries of each speaker/presentation are provided below.

### *John Allen and Charlie Watts, U.S. Department of Labor, Employment and Training Administration*

John Allen and Charlie Watts, workforce development specialists from the U.S. Department of Labor, Employment and Training Administration, Region IV, spoke to participants on the topic of grants management. Funding options allow for DOL/HHS to pay for any type of subsidized employment expenses, including administration and participant wages. These joint partnerships need to remain accountable by meeting grant guidelines, Federal cost principles, and other Federal financial standards (e.g. budget controls, accounting records, source documentation, etc.).

The speakers moved next to a discussion on Memorandums of Understanding (MOUs). MOUs help determine funding arrangements between partners, identify the purpose of the fund, and establish reporting requirements. At the local level, MOUs become more elaborate, serving as a guide for program implementation. The speakers described "cost principles" as a determiner for what costs are proper, efficient, and of clear benefit to the funded program. Cost principles, and other accounting standards are what auditors look for when examining a program's direct and indirect costs.

When it comes to Federal reporting, agencies offering grants have to design, implement, and follow a procurement system. This system needs to incorporate full and open competition, except in cases of sole source offerings. The speakers recommended keeping a "boiler plate" contract on file that includes a full complement of agency clauses and stipulations. New contracts simply have to remove any clauses that do not apply. The speakers also advised keeping complete documentation of all purchases and procurements. One of the biggest issues they encounter are agencies that do not keep full documentation of "gray area" expenses as well as meal and commuting costs, which, in many cases, are not allowable.

In closing, the speakers reiterated the importance of internal controls. Concerning cash management, agencies cannot earn interest income on Federal funds. Improper financial reporting and inaccurate accrual reporting are the type of oversights that will cause Congress to believe an agency is not properly managing their allocated funds. In answer to a question concerning the steps taken when questionable costs are discovered, the speakers replied that they initially try to reach an agreement with sites where the funds for the unallowable costs are returned. If this agreement cannot be reached, the final decision will lie with the grants officer. As a step of last resort, debt collection services are utilized.

### *Janice Caldwell, Region VI, Regional Grants Management Department*

The next presentation was led by Janice Caldwell from Region VI's Regional Grants Management department. Ms. Caldwell spoke to the group on the types of available TANF funds, Maintenance of Effort (MOE) requirements, and other TANF related regulations. Beginning her discussion with TANF contingency funds, she described this as resources in place to assist States meet their need for welfare assistance during periods of economic downturn.

Only "needy" States can apply based on unemployment rates and/or increases in SNAP (food stamp) caseloads. Tribes and territories are not eligible for contingency funds. Ms. Caldwell also reviewed background information on the Supplemental Fund and Emergency TANF Contingency Fund.

As described by Ms. Caldwell, every Federal Fiscal Year (FFY), States must expend a fixed amount of its own (non-Federal) dollars to provide benefits and services to eligible families. Known as the Maintenance of Effort (MOE), this spending requirement is calculated based on the amount the State expended in FFY 1994. The amount equals:

- Seventy-five percent of the amount, if the State meets its work participation rates, otherwise;
- Eight percent of the amount; or
- One-hundred percent if the State receives Contingency Fund dollars.

MOE expenditures must occur within the current FFY (e.g. FFY 2010 MOE expenditures must occur by September 30, 2010). Any MOE expenditure made outside of the FFY will not count toward the State's current MOE requirement.

Ms. Caldwell next covered TANF administrative caps and quarterly reporting requirement. In particular, she mentioned that quarterly TANF reports will soon be submitted via the On-line Data Collection System (OLDC). OLDC allows program staff to receive confirmation that their 196 report was properly submitted and to also review this document online. Ms. Caldwell concluded her presentation by reviewing State TANF awards in 2010 to date.

### Day One Wrap-Up and State Reflections

Larry Brendel, TANF Program Manager- Region VI provided closing remarks to the group and encouraged people to continue to dialogue and work together for the benefit of families and communities. He reiterated the message of Michael Thurmond that when having a bad day, remember the families that are served by TANF and WIA and "don't give out, don't give in, don't give up." He thanked his immediate staff and the regional office, Felicia and the Denver region, Frank and his staff, all his presenters, and content and logistical contractors.

## Day Two

### *Welcoming Remarks from ACF and ETA Regional Administrators*



Leon R. McCowan, ACF Region VI Administrator, welcomed individuals to Dallas and encouraged the partnership that organized the conference. He recognized that partnerships rely on frontline workers who are committed to families and communities. Though partnerships are difficult, when put into practice, programs see improved results for families. Mr. McCowan reiterated that partnerships support the growing needs of clients, particularly in the current economic climate.

Joseph C. Juarez, ETA Region IV Administrator, welcomed participants to Dallas and stated his hope that participants took full advantage of the opportunity to work with colleagues and peers from other agencies. He repeated the theme of the meeting and asked participants to think about "how do you provide the best client services possible?" According to Mr. Juarez, success is not created in silos; agencies do not achieve success by themselves.

### *Keynote Address: What Makes Partnerships Work?*

*Susan Curnan, Director Center for Youth and Communities, Brandeis University*

Susan Curnan, Director Center for Youth and Communities, Brandeis University, addressed the participants, asking them to hold onto stories of their clients. She posed the following question to those in the room with more than 30 years in the field: How many of you in your careers have experienced developing partnerships? Ms. Curnan illustrated the importance of "interagency" partnerships and provided examples from recent travels. She highlighted particular partnerships that she witnessed in New York City and Washington, DC, and discussed her plans to travel to Los Angeles to work on a Gates initiative, which brings together community organizations working with community colleges to help kids enroll and stay in college.

Ms. Curnan introduced the mission of the Heller School Brandeis, which focuses on strengthening governments across sectors. In researching what makes partnerships work and what causes them to fail, the Heller School has found that 80% of partnerships fail. She highlighted reasons for failed partnerships, and discussed her 30+ years of experience with partnerships. One of the topics discussed was DOL partnerships. Though there were many false starts and failures in the past as it relates to partnerships, Ms. Curnan noted the following points regarding why partnerships would work today. They are as follows:

- 1.) There has been a knowledge explosion in the last decade that is supported by science.
- 2.) There are new neighbors and changing neighbors. The shift in demographics and labor market demand requires new skills.
- 3.) The economic collapse and financial crisis is presently active and affecting communities.

Ms. Curnan stated that the combination of the previous points have created new opportunities for partnerships that were not available before. She discussed the knowledge explosion in greater detail and provided support for a more

holistic approach that was based on research conducted in the last ten years. She highlighted two publications from The National Research Council (NRC) that have driven changes in legislation and social innovation.

The first publication, *Neurons to Neighborhoods*, focuses on early childhood development and reports research finding that both nature and nurture drive human success. The second, *Community Programs that Promote Youth Development*, addresses assets that predict adult success. These assets include: social development, psychological and emotional development, physical development, and intellectual development. The publication highlights the need to broker these connections. One example of how to do so, was to add question(s) to performance reviews that ask workers to specify what they have done to improve the lives of children, youth, and families? NRC reports that focus should be placed on what a client needs; furthermore, that appropriate mechanisms should be able to monitor the accessibility of these programs. NRC also listed three questions that should be asked and answered in order to make a successful partnership:

- 1.) Who will be served?
- 2.) What outcomes should be achieved?
- 3.) What mix of training, supports, and opportunities need to be provided?

Next, Professor Curnan addressed what things can be done and which tools are available to help agencies create successful partnerships. She provided the elements on the Managing Complex Change handout and reiterated that without a well-articulated vision, there is room for confusion. Ms. Curnan also emphasized the importance of having well defined job descriptions and responsibilities if the program's vision changes. She also discussed the ramifications of making changes that are not well defined; including the impact it will have on a program's success, and drew attention to the following necessities for programs to achieve successful partnerships:

- Adequate incentives;
- Sense of ownership;
- Action plans that include a comprehensive outline of responsibilities;
- Equitable division of responsibilities;
- Openness and ability to change by using personal and institutional power to ensure that necessary changes are made (i.e., ensuring MIS system supports new system); and
- Ability to recognize that changes occur gradually and celebrations should be placed on hold until programs see clear results that changes are benefitting clients.

Findings from Dr. Curnan's research in *Innovating under Pressure: the Report* were presented. The goals of the study were: serve as many youth as possible (16,650); spend ARRA funds quickly and wisely with transparency and accountability; and to provide meaningful summer experience to participating youth. The success of the study included: assets/innovations that had to do with collaboration, invested partnership with a focus on mission, the creation of Youth Consortium in Detroit, and multiple partnerships with schools such as those in Chicago, Indianapolis, Maricopa, and Phoenix. Key findings from this study included: the need to be responsive to local needs; that new operating structures needed to be mission driven and have results orientated leadership; and the strengthened public-private partnerships were a success. Common challenges included: eligibility; funding/cash flow; job matching; assessment and reporting; and green jobs. The most effective way to address these challenges was to develop strong and effective leadership that allowed all partners to take ownership of the project including sharing information, influence, and financial stakes. Lastly, without effective communication the partnership will not be a success.

In her presentation, Ms. Curnan discussed "Roll the Dice", an effective model for planning a partnership. She highlighted the importance of using a managing complex and tailoring it to fit the program's specific needs. It was also noted that finding common language between partners is important and remembering constraints in the process such as inexperience, fear of negative experience, an unproven track record, and lack of time and resources.

**Question:** Have you ever been in a situation where the challenge was greater than your capacity to deliver?

**Response:** It is what you say and how you say it. What I mean by it is not just what you say and how you say it—has to do with a certain who knows best attitude. It probably would be a good lesson to create a common language because I have noticed there is a lot of lost time just arguing over the meaning of words.

**Question:** How would you change practice and programming to improve partnership development and collaboration among TANF and WIA and other partners?

**Response (Frank):** Just looking at the questions, I think we are all clear here that we are serving the same people. We are working through how our outcomes match up and what kind of opportunities we can jointly provide our participants. We are working through particularly all the meaning.

**Response (Susan):** I do not know that there is a big cultural difference between the agencies but it is something to think about.

**Question (John):** How do you get past the initial start up and enthusiasm to actually have the system buy into partnership?

**Response (Susan):** The key thing is to focus on being outcome oriented. One example is the Detroit partnership, Good Schools, and Good Neighborhoods. They assembled something called the 2017 Task Force—they have all the key stakeholders in the room saying that they will organize their work to achieve the 2017 goals. It is benchmarked every quarter. They have to share information in a new and effective manner. They are passionate about the mission. That ownership model is really key if you have an outcome orientation.

### *Expanding Our Repertoire, Expanding Our Partnerships*

This session brought together the United States Department of Agriculture (USDA), Department of Housing and Urban Development (HUD), and the Department of Transportation (DOT) to discuss ways in which they have been collaborating with DOL-ETA and TANF agencies. Four speakers discussed ways to enhance cross-agency collaboration at the Federal, State, and local levels for the purpose of serving shared clients in a more holistic manner to improve their success.

The first speaker was Charles Eldridge, Public Housing Revitalization Specialist at HUD. His presentation focused on HUD's Family Self-Sufficiency (FSS) Programs, and how the self-sufficiency focused goals and activities of this program make it a natural partnership with TANF. As he described, FSS is a HUD program that encourages

communities to develop local strategies to help assisted families obtain employment that will lead to economic independence and self-sufficiency. Public housing agencies (PHAs) work with welfare agencies, school, businesses, and other local partners to develop a comprehensive program that gives participating FSS family members the skills and experience to enable them to obtain an employment that pays a living wage.

FSS funds two types of entities, Public Housing Agencies (PHAs) and nonprofit organizations. These agencies provide housing vouchers, job and education training, childcare assistance, budget counseling, and transportation supports with the overall goal of moving families into home ownership. Any family receiving Section 8 of Public Housing assistance can participate in FSS. Preference is given to working families, homeless individuals, and victims of domestic violence and natural disasters. Participants are enrolled in FSS for a maximum of five years.

The first question posed to Mr. Eldridge concerned TANF and HUD collaboration. Specifically, whether activities provided through HUD programs are eligible as countable work activities for enrolled TANF participants. Mr. Eldridge answered that, between TANF and HUD, there is a great deal of service duplication, overlap in training and education, and program funding eligible for housing. As a follow-up question, one participant asked if HUD shares data with TANF on their participants. Mr. Eldridge answered that data sharing is something of great interest to HUD, as it would contribute to their goal of accelerating families towards self-sufficiency. Another question was posed concerning whether individuals can shift between public housing locations if relocation places them closer to a worksite. Mr. Eldridge responded that it is less complicated if someone stays within the Section 8 Program, but HUD does provide transportation to jobs and work training opportunities. He added that individuals enrolled in the Section 8 Program are not required to participate in the FSS program.

Following the question and answer portion of his presentation, Mr. Eldridge distributed a series of handouts on HUD's homeless programs.

Gerald Jenson, Senior Community Planning and Development Specialist at HUD, spoke to attendees on his agency's efforts to assist local governments and nonprofits that administer homeless programs. In support of these programs, HUD funds housing, job training, and, for those individuals facing financial crisis, rental subsidies for up to 18 months, including utility bills that are past due. He added that there are two main types of homeless programs at HUD, transitional, which supports individuals for up to 2 years, and permanent long-term rental assistance, designed for individuals with physical/mental disabilities or HIV/AIDS. Across both types of homeless programs there are three main goals: (1) help individuals achieve residential stability; (2) increase their individuals' skills and income; and (3) help them build greater self-determination. Mr. Jenson closed by mentioning that the Department of Education, HUD, and HHS are currently collaborating on a homeless vouchers pilot program.

Peggy Crist, Director of Planning and Program Development at DOT's Federal Transit Administration, discussed with attendees her agency's efforts to overcome transportation barriers and increase transit mobility and access for communities throughout the country. She spoke first about available DOT grant programs that fund transportation programs seeking to connect all members of the community to employment, healthcare, and education, in both rural and urban areas. With encouragement from the Obama administration, these grant programs have become increasingly flexible. There are both discretionary and formula grant programs available. Discretionary funds were previously earmarked by Congress, but in 2010 these funds are now available through standard grant channels (i.e. issued notices of funding availability).

Ms. Crist reviewed some of the programs currently receiving DOT support, including: vehicle purchases on the Choctaw Reservation; the addition of more public transit stations in Albuquerque, New Mexico, and a large street car project in Fort Worth, Texas. The largest grants are provided to urban areas with populations exceeding 50,000.

These grants are made directly to the city's transit authority. Grants to Rural and Tribal programs are usually administered by the State or Tribe's transportation program. Specialized programs are also available for elderly, disabled, TANF, and other low-income populations. DOT's New Freedom program provides tools and support that assist individuals with disabilities overcome transportation barriers and transition into mainstream society. DOT's JARC (Job Access and Reverse Commute) program funds projects that supports individuals in rural and urban areas with limited transportation options, access employment and support services. JARC solicits proposals for these types of projects on an annual basis.

Leslie Lankster from USDA's Food and Nutrition Service (FNS) provided attendees with an overview of FNS's work increasing food security and reducing hunger, and reviewed the agency's Supplemental Nutrition Assistance Program (SNAP) and National School Lunch Program (NSLP). Ms. Lankster also discussed FNS' strong belief in the need for partnerships to end hunger. She pointed to the FNS/HHS Summer Food Service (SFS) program as an example of effective, cross-agency collaboration. The SFS program provides free meals (usually breakfast and lunch) to low-income children during the summer months when school is not in session. This program also provides low-income adults with job opportunities by hiring these individuals to work at SFS sites conducting meal preparation and other related activities.

### ***Concurrent Topical Presentations***

All attendees participated in three breakout sessions. Each of the breakout sessions allowed time for attendees to engage in the discussion and share with peers and presenters individual experiences, promising strategies, and challenges within the specific topic area being discussed. Each session was repeated to ensure that all participants had an opportunity to attend multiple sessions. Session topics included: Serving TANF Eligibles, Strengthening Programs through Partnership, and Integrated Services Delivery. A summary of each concurrent presentation is outlined below.

### **Serving TANF Eligibles**

Linda Hughes, TANF Program Manager for Oklahoma Department of Human Services, presented on Oklahoma's Subsidized Employment Program (SEP)- a program funded with TANF Emergency Contingency funds. The program is designed with three objectives: support Oklahoma employers to grow their businesses; assist Oklahomans in their transition back into the workforce; and reduce taxpayer dollars spent on food, childcare, medical and other benefits for Oklahomans.

Any employer in the state of Oklahoma who is willing to hire full-time positions at the required set rate is eligible to participate. Currently, there are about 50 employers participating either independently or through employer agencies. Other requirements include: employee must be a new hire; employee must have a child receiving Family Support Services benefits (TANF, SNAP, etc); employee must meet low-income definition of less than 185% of the Federal Poverty Rate; and employer must agree to pay employee a minimum \$10/hr and hire them full-time (minimum 35hr/week). If all requirements are met, then the employer is eligible for the four month subsidy program for which there is 100% wage subsidy paid to the employer for the first month and 50% wage reimbursement for the remaining three months of the program. If the employers retain the employee for the entire four months they receive full reimbursement for wages. There is an expectation that the employer will continue employment once subsidized employment is over.

Oklahoma Department of Human Services (OKDHS) is responsible for forwarding employer monthly invoices to the OKDHS finance division for reimbursement with a target ten day turnaround if forms are submitted correctly. They also remain available for follow up, support services, and dispute resolutions.

Ms. Hughes indicated that this program has been incredibly successful in Oklahoma, having placed 892 Oklahomans back into the work force since August 2009. As of July 31, 2010, 80% of these workers remain in a livable wage situation. The unemployment expense for the group was zero. There has been tremendous positive feedback from employers in regard to ease of reimbursement process, minimal amount of paperwork, and opportunity to increase profits while growing their businesses.

In addition to the flagship program, Oklahoma also piloted the Summer Youth Employment Program (SYEP). This program was a partnership between OKDHS and the workforce team, combining funding and infrastructure. Through this program there are 827 enrolled and 587 placed at worksites. The other teens are still working on their job readiness skills. One advantage of this program is that youth see the value of education once they are in the workplace. This program did not count as income on a TANF case.

Carol Cartledge, Director of Public Assistance, North Dakota Department of Human Services, introduced the two programs from North Dakota: PRIDE and Foster. PRIDE is a collaborative effort involving the North Dakota Department of Human Services, Job Service North Dakota, District Courts and Child Support Enforcement. After researching the effectiveness of the programs they expanded into eight locations in 2009. Today the program is funded by TANF and subsidized employment under Employment/TANF. There are also supportive services funded by ARRA funds as the program continues to evolve with the hope of extended funding. FOSTER, a collaborative partnership between Child and Family Services, Community Options and the Department of Human Services, was designed to address foster children aging out of care and was started in September 2009.

Susan Gunsch, Manager, Workforce Programs at North Dakota Workforce Services presented on PRIDE, which was developed with the purpose of providing one-on-one assistance to unemployed or underemployed non-custodial parents in the payment of child support by using the case management approach. This approach includes: monitored job search, job referral or job placement, and support services to remove barriers to employment. Referrals to PRIDE are court mandated, child support enforcement, and IV-D cases only.

The first step in developing this program was getting the support of the courts. In the eight locations in which this program currently operates, the judges are very supportive. Case management begins in the court room when they have their court hearings. Case managers meet with the individual directly after the hearing and act as not only an advocate for employment but also a liaison in the community. By forming these connections, case managers are able to tailor their services to the individual and to increase job retention. The case manager also interfaces with Child Support Enforcement and MIS so they know when referrals are made. An individualized employment plan is developed with the participant and any necessary support services are identified. Barriers, which include education levels, offender status, substance abuse, transportation, etc., are identified, and steps are taken to address these, e.g., workforce training. The participant is enrolled in the Wagner Kaiser online employment system and is assisted with job search/development. The program has access to all services related to their employment goals (WIA, Worktrack, workshops to develop skills, etc.).

There are numerous indicators of success for this program. Once PRIDE participants obtain employment they are tracked for six months in Worktrack, which tracks both subsidized and unsubsidized employment. Once participants have maintained employment for six months they are exited from the program with a completion code. Of the 325 clients in Worktrack, 65.54% have successful completion. In the first quarter of 2009, the average wage

increased from the quarter before PRIDE enrollment and the quarter following PRIDE exit was \$1,387. This number does not include individuals whose employment status was unable to be tracked (e.g. work out of state). 49% of individuals saw an increase in earnings following PRIDE participation. Ninety-three percent of participants increased child support payments, with the average payment almost doubling in size from \$94 in the six months prior to enrollment to \$182 in the six month after PRIDE referral. In addition, frequency of payments increased.

Carol Cartledge presented FOSTER, a collaborative partnership between Child and Family Services, Community Options and Department of Human Services, designed to address foster children aging out of care. Carol discussed her personal experience as a foster parent, the process of having to do interventions on her own, and the outcome of her fostering experience.

FOSTER was started in September 2009, as a subsidized employment program for youth under care, custody, and control of county social services, Division of Juvenile Services or North Dakota Executive Director. TANF stimulus funds are used to support the program. The purpose of FOSTER is to prepare youth for living as an adult by providing employment, transportation assistance, and case management. Ms. Cartledge reported that the biggest difficulty was starting a program that was efficient and effective in such a short period of time. To do this, they partnered with Community Options, Inc.

Trina Gress, Chief Operating Manager of Community Options Inc, North Dakota, presented on the partnership with North Dakota Department of Human Services. Trina applauded all the participants at the conference, noting that it was nice to see the Department of Labor coming together with TANF and seeing the results of networking. She recommended bringing on vocational rehabilitation to help fully understand the work piece. Next Ms. Gress, went through the history of Community Options Inc., which was founded in 1997 as a for-profit company that specialized in employment referrals. They learned that not everyone wants to work but that everyone has to work. Of the two branches of the company, residential and employment, the residential branch grew much quicker than the employment branch. The residential branch provides a number of services to families and those with disabilities. The employment branch provides services to a diverse set of clients through a supportive employment model. The FOSTER Program is very new and was designed with the goal of enhancing youth employment efforts in achieving sustainable employment towards self-efficiency. Through a collaborative effort with the North Dakota Department of Human Services, public assistance, children and families, and Community Options, the program began to take shape. The program takes referrals for foster children 16 and older. If they choose to be emancipated, they have the option of signing back into the program after emancipation. Placement specialists work with youth to secure opportunities and maintain employment. They follow up with both the youth and employer through weekly/monthly visits.

Referrals to FOSTER come from various entities, thus ongoing communication is incredibly important to the success of the program. The placement specialist not only works with the youth to help them gain subsidized employment but also helps them analyze their skills and work preferences, understand the work culture, develop a resume, and acquire transferrable skills. The placement specialist also helps the youth with the "little steps" (i.e. filling out new hire paperwork, depositing pay checks, etc.). Lastly, the program aims to bring in other entities to ensure that youth remain at the job placement for the duration of the program to encourage self-sufficiency.

### Strengthening Programs through Partnership

This session showcased two programs working with multiple partners to address the needs of low-income populations. Charlotte Bristow from ACF's Region 6 office provided introductions and facilitated this session.

Phil Harris, TANF Assistant Director at the Arkansas Department of Workforce Services spoke to attendees on his State's Career Pathways Initiative (CPI), a program designed to meet Arkansas's growing education and economic development challenges. Mr. Harris began his presentation by describing some of these self-sufficiency challenges and explaining how Arkansas' economy is directly related to the level of education of its citizens. CPI began as a pilot in 2003 to see if the State could improve earnings and postsecondary attainment among its TANF and TANF-eligible populations. The program emphasized building job readiness skills, basic academic skills preparation, remediation, and postsecondary credentials tied to high-wage, high-demand occupations.

With support from the Governor's Workforce Cabinet and the Arkansas community college system, CPI provides participants with marketable education credentials that allow for immediate entry into a high demand, high-wage occupation (e.g. manufacturing, health care, transportation, warehousing, and management services). CPI participants receive academic and student service support (transportation, childcare, books, and tuition) as well as other wrap-around services like career assessment, advising, job search skills, and job placement assistance. CPI programs are co-located at workforce service agencies and are funded through TANF dollars. The Initiative serves current and former Transitional Employment Assistance (TEA) participants, SNAP, Medicaid, or TANF-eligible students that are currently or newly enrolled at a participating two-year college in Arkansas.

CPI partners with the Department of Workforce Services to conduct Labor Management Information (LMI) studies that identify high-growth, high-wage sectors for inclusion in the program. To date, LMI studies have helped CPI map over 300 job pathways. Partnerships with local businesses and industry have also helped in identifying promising job sectors and in facilitating the placement of CPI graduates in sustainable careers that match CPI participants' interests and skills.

In FY 2009, CPI reported a number of promising outcomes, including: enrolling 890 TEA participants; assisting 9,400 enrolled students in CPI activities; helping 58.7 percent of graduates immediately enter a high-wage, high-demand job sector (goal was previously set at 55 percent); and assisting over 80 percent of graduates obtain employment within six months of completing the CPI program. CPI is now present at 25 community colleges and technical branch campuses.

Following the CPI presentation, attendees wished to know which agency conducts case management and referrals. Mr. Harris answered that TANF administers the case management component of CPI, the Department of Human Services administers referrals, and the Department of Education conducts outreach and recruitment among TANF-eligible individuals. Participating community colleges are required to track outcomes among CPI participants and report this information to TANF caseworkers. Mr. Harris added that participation in CPI counts towards TANF participants' mandated work participation hours. He reported that the annual cost per CPI participant is \$1,500. Mr. Harris also mentioned that tracking data on CPI graduates is an ongoing challenge. Attendees suggested he examine wage records from States bordering Arkansas to determine if CPI graduates were going out-of-state to find employment.

Nicole Verter, Director of Workforce Policy and Program Assistance at the Texas Workforce Commission's Non-Custodial Parents (NCP) Choices Program along with Michael Hayes, Deputy for Family Initiatives at the Office of the Texas Attorney General's Child Support Division presented on Texas's NCP Choices program. NCP Choices is a collaborative effort of the Office of the Attorney General (OAG) of Texas, the Texas Workforce Commission (TWC), local workforce development boards, and family court judges. The program targets low-income unemployed or underemployed noncustodial parents (NCPs) who are behind on their child support payments and whose children are current or former recipients of public assistance. The goal of NCP Choices is to help NCPs overcome

substantial barriers to employment and career advancement, exit the TANF program, and become economically self-sufficient while making consistent child support payments.

At the earliest stages of NCP Choices' implementation, it was found that, among other NCP programs, the greatest challenge was non-custodial fathers not appearing at court-mandated child support appointments. To ensure rapid attachment to the Office of Child Support, NCP Choices provides enhanced child support case compliance monitoring and employment services for noncustodial parents linked to a TANF/Medicaid case who are unemployed or underemployed and are not compliant with their child support obligations. NCP Choices mirrors Texas's TANF Choices program by providing employment services combined with swift and certain sanctions for those who fail to comply with program requirements. NCP Choices services include: job referrals; support services; short-term training; subsidized employment/work experience; GED, ESL classes, and; retention assistance and career advancement planning. Responsibilities among the three State agencies involved with NCP Choices are as follows:

- Child Support
  - Identifies and prepares cases;
  - Monitors payments and workforce reports; and
  - Prepares legal actions as needed.
- Workforce
  - Receives NCPs ordered in at court;
  - Provides services and monitors compliance; and
  - Reports to Child Support and courts.
- Courts
  - Orders participation in program;
  - Conducts compliance hearings; and
  - Applies swift and certain consequences.

To date, NCP Choices has assisted 81 percent of participating NCPs enter employment, on average, within four weeks of program entry and sixty-one percent of participants retain employment for at least six months. The average child support collection per NCP is \$4,000 compared to an average cost of \$1,000 per NCP served. As a result of these outcomes, NCP Choices has expanded from five counties during the 2005-2006 pilot stage to 25 counties in 2010. Both presenters attributed much of NCP Choices success to their co-location model and emphasis on immediate attachment to the workforce and child support systems. Close and ongoing communication between workforce, child support, and judges is also crucial for success. There is also a strong public image of NCP Choices based on the fact that the program is keeping individuals out of prison, thus saving tax dollars.

As next steps, NCP Choices is preparing to add a fatherhood curriculum, put procedures in place to help judges work across county lines, and implement an online tracking system known as Choices Online Tracking System (COLTS). COLTS is a Web based communication tool that allows workforce and child support staff to quickly communicate and share participant data from both systems.

In response to attendee questions, Ms. Verver and Mr. Hayes stated that participants are always court ordered and their arrears are not forgiven. Almost 97 percent of individuals agree to participate in NCP Choices rather than spend time in prison. NCP Choices has shown strong results with the ex-offender population as well. The speakers

also mentioned that the Federal Office of Child Support strongly supports the NCP Choices model based on its cost-saving outcomes, increase in child support collection, and effectiveness in employing non-working men.

### Integrated Services Delivery

The purpose of this session was to showcase two programs that employ integrated service delivery systems to address multiple needs of low-income youth and families. YouthBuild is a youth and community development program that simultaneously addresses core issues facing low-income communities: housing, education, employment, crime prevention, and leadership development. Family Pathfinders of Tarrant County is an integrated service delivery program made up of volunteers and representatives from several social service agencies, whose mission is to strengthen the community by empowering low-income families to bridge the gap from poverty to self-sufficiency.

David Clauss, Program Director for the Casa Verde Builders, American Youth Works in Austin, Texas, started off the conversation about the YouthBuild Program. He provided an overview of YouthBuild and its purpose, which is to "unleash the positive energy of unemployed young adults to rebuild their communities and their own lives with a commitment to work, education, responsibility, and family." He explained that through YouthBuild programs, young people ages 16-24 work toward their GED or high school diploma, learn job skills and serve their communities by building affordable housing, and transform their own lives and roles in society.



YouthBuild started as a community effort in 1978 in Harlem, New York City. In 1990, YouthBuild USA was founded to spread YouthBuild nation-wide. By the early 1990s the program had been replicated in 11 cities. YouthBuild programs were mostly funded by HUD, but beginning in 2008 that funding switched to DOL. Today there are more than 226 YouthBuild programs in 44 states. It has helped more than 84,000 young adults move forward with their lives into college or productive employment and YouthBuild students have built over 18,000 units of affordable housing.

Next, Mr. Clauss explained that his program, American Youth Works, started as a literacy program. It was founded on the American ideal of service. The program now includes: a Charter School, Green Energy Corps, Computer Corps, Environmental Corps, and Casa Verde Builders. The program serves about 200-300 youth and operates YouthBuild, Conservation Corps, and Community Corps. The YouthBuild program lasts about six months, with a probationary period of one to four weeks focused on "mental toughness." Participants split their time between On the Job Training (OJT) at the construction site and the classroom, earning their GED or high school diploma, learning to be community leaders, and preparing for jobs or college.

Mr. Clauss then provided a detailed description of the YouthBuild program. Eligible YouthBuild students are between the ages of 17 and 24 and have dropped out of high school. YouthBuild creates transitional services for youth and serves as a great model for disengaged youth, especially gang-involved youth. YouthBuild is affordable housing, as students build houses for families in need. Students learn construction skills that can lead to a career with high pay and excellent benefits.

YouthBuild provides students with an education, leadership skills, job training, and counseling. Supportive services, such as Life Skills Class and case management, are also provided in the YouthBuild program. Case managers are central figures in the students' lives, and are responsible for coordinating important support services.

At the beginning of the program case managers help students assess the following:

- Goals
- Mental and Physical Health
- Substance Abuse History
- Family Situation
- Relationships
- Educational Background
- Employment History
- Financial Issues
- Legal Issues

Community service plays a central role in the YouthBuild program. As part of the curriculum, students are required to complete 300 hours of community service by graduation. Each student that successfully completes the program earns an educational award of \$1,000, good for up to seven years, which can be used for education costs at qualified institutions of higher education, for educational training, or to repay qualified student loans. The community service component is a way to reconnect youth to their communities through "doing." In the process of changing their own lives, students knock down barriers to their development and remove negative stereotypes about out-of-school youth.

YouthBuild also provides transitional services to the students with a goal to assist in the following areas of higher education and career development:

- Career Workshops
- Job Shadowing Days
- Job Fair Announcements
- Internet Job Searches
- Resume Writing Assistance
- Employment Referrals
- Assistance with Applications
- Assistance with Financial Aid Forms
- College Visitations
- College Enrollment and Registration
- Drivers License Preparation

The overall goal of Career Development is to support students and graduates as they continue their education, advance in the workplace, and make plans for their future.

Mr. Clauss ended his presentation by describing the positive impact that YouthBuild has had on its students. Upon graduating, YouthBuild is not over as participants are part of a national alumni network. YouthBuild staff assists graduates in planning next steps and in setting future goals.

Following Mr. Clauss' presentation, Ms. Tracey Polson, YouthBuild Program Coordinator for the Community Development Support Association provided further information on the YouthBuild program. She stated that the goal of YouthBuild is to get students involved in community service projects. In her organization, the Community Development Support Association of Enid, Oklahoma, students are involved in building splash pads (similar to pools) in local parks, and are helping to gut old homes.

Ms. Polson described the demographics of the YouthBuild program attendees. There are commonly high teen pregnancy issues, which especially include young teen parenting and teen fathers. The program serves a high number of incarcerated youth. Many students are skills deficient when starting the program. Results of the Community Development Support Association YouthBuild program show that students' skill levels are greatly improving. The program has seen a 71 percent increase in literacy and numeracy as well as a 79 percent increase in the credential rate. Students typically use the KeyTrain program to identify and enhance their skills.



Finally, Ms. Peggy Badlato, Program Manager from Family Pathfinders of Tarrant County, Inc. discussed the integrated service delivery systems of her program. The goal of the Family Pathfinders program is to break the cycle of poverty. The program serves both adults and youth, including those enrolled in WIA, TANF, and SNAP. Family Pathfinders has adapted since its inception to serve this variety of populations.

The program involves career steps, which include mentoring. A team approach to mentoring is generally taken, which involves three to five individuals. Mentors are trained and they help individuals with setting goals and breaking them into manageable pieces.

Career steps of the program also include both paid and unpaid work experience for Workforce customers. The program has developed strong relationships with employers. Participants work with these employers (from public, private, nonprofit, and for-profit companies) to make jobs a positive experience. The Family Pathfinders program has developed positions for 4,000 individuals. The program is successful in placing so many participants into jobs because employers benefit by having access to a free workforce. Additionally, the community benefits from having a better trained workforce, and the public benefits from having a reduced case load. The program offers a win-win situation for all involved.

### Questions and Response Session

Immediately following Ms. Badlato's presentation, meeting participants were invited to ask questions of all three presenters. Questions and answers are listed below.

**Question:** What kind of support systems do you have for YouthBuild?

**Response:** We follow DOL requirements and track clients for extended periods of time to make certain that they have succeeded.

**Question:** What is the upper age limit for YouthBuild projects?

**Response:** 24 years old.

**Question:** Has YouthBuild been actively involved in the Gulf Coast rebuilding activities after the hurricanes and oil spill?

**Response:** There are YouthBuild chapters that work in communities that have been impacted by hurricanes, floods, etc.

**Question:** How does YouthBuild measure the literacy and numeracy standard?

**Response:** We use testing to improve numeracy and literacy.

**Question:** Do you currently serve individuals with disabilities?

**Response:**

- There has been limited participation of people with physical disabilities, but typically they include mental health issues and substance abuse issues at the job sites.
- Most worksites are ADA compliant so that they have wheelchair ramps and other accessibility measures built in.

**Question:** How does the program select participants when there are significantly more applicants than available slots?

**Response:**

- The program prioritizes specific populations, (i.e., veterans) and then interviews and assesses people to determine that the people who are the best fit for the program will participate.
- Participants usually drop out or make the processing simpler.
- There is an application process, certifying documents, and site visits to work sites to introduce individuals to the worksites.
- The programs also utilize academic testing to make certain that participants are at a specific academic level (at least 2 grade levels below) and the program offers some additional support to try to bring individuals up to higher level.

**Question:** Can you describe your staff?

**Response:**

- Typically staff is high school educated and at times college educated, but there are additional staff members that have degrees in psychology, therapy, education, construction, etc.
- Staff has youth services background/skills or may be construction workers with people skills who can work with high school kids and other kids that join the program.
- Former participants and AmeriCorps participants often become staff.

## *Maintaining Work Programs for Our Clients*

This final session of the day included presentations from four individuals and focused on using subsidized, transitional, and supported work programs to move participants into the labor force. The discussion emphasized innovative strategies for developing and maintaining subsidized work programs, and improving long-term employment outcomes.

Chris Warland, Program and Policy Liaison at the National Transitional Jobs Network (NTJN), presented on his organization's work surrounding advancing and strengthening transitional jobs (TJ) programs around the country. NTJN is a coalition of city, State, and Federal policymakers, community workforce organizations, anti-poverty nonprofit service providers, and advocacy organizations working in the field of TJ and subsidized employment. In addition to advocating on the importance of TJ, NTJN shares best practices and provides technical assistance throughout their network of partners.

For many years and primarily since the passage of PRWORA in 1996, the number of people receiving cash assistance has declined and the number of individuals earning wages and working has increased. Over the last decade, an increasing number of localities have utilized "transitional jobs"—to provide short-term, publicly subsidized jobs that combine on-the-job work experience with an array of support services to help participants overcome their barriers to employment. For example, a transitional jobs program may combine 20 hours of work per week with an additional 15 hours of substance abuse treatment, basic skills education, parenting skills classes, or financial education. In addition, participants receive a full array of work supports, such as child care, transportation assistance, Medicaid, and SNAP, and often obtain support from a "job coach" or on-site mentor that teaches "soft skills" such as punctuality, dress, and other workplace expectations. Unlike "welfare," in which recipients must perform public work in exchange for their benefit checks, transitional jobs are real jobs that pay real wages. Participants are paid for every hour worked, reinforcing the message that "work pays." In addition, participants are eligible for the Earned Income Tax Credit, which can further supplement their incomes.

The most extensive programs are Washington's Community Jobs Program and Pennsylvania's Philadelphia@Work, the transitional jobs program operated by the Transitional Work Corporation (TWC) -- a partnership between the Commonwealth of Pennsylvania, the city of Philadelphia, and the Pew Charitable Trusts. In TWC's program, participants are placed in six-month employment positions, working 25 hours a week and receiving 10 hours a week of professional development, English as a Second Language training, and literacy classes. These participants earn a wage per hours worked, as well as a bonus upon attaining and keeping an unsubsidized job. While in the program, participants also receive one-on-one guidance both through TWC (the "career advisor") and on the job (the "work partner"). Participants have access to services such as child care, transportation to and from work, and health assessments.

Another model policymakers could consider drawing from is the Georgia Department of Labor's GoodWorks! program. Under state Labor Commissioner Michael Thurmond's leadership, GoodWORKS! brings together public agencies and private providers, such as Goodwill Industries, to provide intensive employment, job readiness, and case management services to welfare recipients who have received cash assistance for 30 months or more. These transitional jobs programs can provide an ideal way to help hard-to-employ participants make the transition into the workforce. And by giving participants the skills and experience necessary to find and keep unsubsidized

Transitional Jobs are a workforce strategy designed to overcome employment obstacles by using time-limited, wage-paying jobs that combine real work, skill development, and supportive services, to transition participants successfully into the labor market. Transitional jobs work best for those who need support the most – incarcerated, hard-to-serve, limited work experience, and disconnected youth. Transitional jobs not only provide work experience and links to education and training, but allow participants to gain understanding of "work culture". On average, transitional jobs participants receive 20-30 hours of paid work with an additional 10 hours dedicated to training, education, and other supportive activities.

employment, transitional jobs help hard-to-employ participants appreciate the value of employment and personal success.

In the last two years, practitioners and policymakers have explored strategies for improving job retention and advancement after TJ participants move into unsubsidized jobs. As Mr. Warland explained, many TJ programs are not currently investing in job retention supports. As a way to sustain gains TJ participants make during their subsidized employment, he advised conducting six months (three contacts per month) of follow-up to track the impact of retention services. Mr. Warland also advised monetary and non-monetary incentives as ways to increase retention. On-site TJ programs, modeled at many Goodwill programs, as well as focused trainings by sector (e.g. green jobs training) are also promising innovations.

With the availability of American Reinvestment and Recovery Act (ARRA) funding, the landscape of TJ and subsidized employment has changed significantly. States are using ARRA funding broadly to support subsidized employment, including TJ. TANF Emergency Funds now support an estimated 180,000 jobs. ARRA will expire in September 30, 2010 and TANF Emergency Fund extension is highly uncertain. Seventy thousand jobs are estimated to be lost immediately on September 30, 2010 if these funds expire. In the case of funding reductions, many States will also have to scale back their TJ and subsidized employment programs.

Mr. Warland concluded his presentation by discussing the implications of the upcoming U.S. Department of Labor's Transitional Jobs Demonstration. This Initiative will make \$45 million available in FFY 2010 and a proposed \$40 million in FFY 2011 for TJ and subsidized employment demonstration projects.

Eva Greenwalt, Program Manager with the Washington Community Jobs (CJ) program, discussed her organization's efforts in providing transitional community-based employment and related training for low-income individuals unable to get a job on their own. The CJ program works with local Workforce Boards, Community Action Agencies, local nonprofits, and other community based contractors to provide WorkFirst (TANF) participants with subsidized employment placements and training to build personal and economic success. Contractors place CJ participants in one of over 2,600 established worksites statewide. The goal of the CJ program is to place low-income individuals in entry-level positions they may not normally have obtained without outside assistance. Common types of employment include clerical, retail, construction, and childcare.

Participants on average work 20-30 hours per week at their work placement over a period of 4-6 months. An additional 10 hours per week are spent with their caseworker focusing on barrier management, securing childcare and transportation assistance, and receiving other support services. Participants also work with their caseworker to establish an Individual Development Plan (IDP). The IDP maps a participant's long-term career pathway and helps them tailor their subsidized employment experience to match specific interests, goals, and skills. Once in the worksite, participants receive a paycheck (not a TANF check), making them eligible for the Earned Income Tax Credit (EITC). Ms. Greenwalt stated that many CJ participants find their most difficult challenge is working through those barriers that interfere with obtaining and staying employed. Participants receive individually designed job search assistance after their subsidized employment placement expires.

Consciously marketing to employers is an integral part of the CJ program. Mr. Greenwalt suggested that when targeting businesses as potential partners; create marketing materials that are designed for employers rather than social workers. Also, ensure that your materials identify all available tax credits in your State and communicate the fact that subsidized job programs are an employment service – they offer prescreened candidates based on employer needs. Partnerships also play a major role in the success of the CJ program. In Washington, CJ is operated by six state agencies using a collective design and operations model. These partners include the

Department of Social and Health Services, Employment Security Department (ESD), Community and Technical Colleges (CTC), Department of Commerce, Office of Financial Management, and Department of Early Learning. Each partner manages a component of the CJ program, for example, ESD administers job placements while CTC and Commerce operate workforce tasks. All partners share an electronic data system which is used to record participants' hours and share documents and resources. In addition, 33 Local Area Planning Teams are in place statewide to address local issues resources.

Annika Holder and Elizabeth Ehrlich, both of New York City's Park Opportunity Program (POP), spoke to participants regarding the service their program provides to low-income individuals seeking higher levels of self-sufficiency. POP is one of the United States' largest transitional employment programs, where trainees gain experience in New York City's parks, playgrounds, and recreation centers. POP trainees learn transferable skills in maintenance, security, horticulture, administration, and customer service while receiving employment services, career counseling, education, and vocational training. POP participants meet regularly with an employment skills counselor to create a self-sufficiency plan based on their career and education goals. POP participants work, on average, 40 hours per week for six months and earn \$9.21/hour. In cases where participants need additional education, POP has established a partnership with New York State Department of Education to have GED tests offered on-site at POP. Through POP, participants are also able to enroll in vocational classes at local community colleges and universities.

In addition to job training and placement, POP participants also receive housing, childcare, transportation, and budgeting supports. Prior to job placement, POP participants are prescreened to match the exact needs of the employer. POP can also look outside of their pool of participants to find an individual that best matches the employer's request.

With the implementation of ARRA, POP has attempted to move their program in line with the changing economy. More of their job placements are now in the healthcare and green jobs fields. POP has secured \$12 million in ARRA funding to implement youth focused vocational training and education, training for employment in the electrical field, hands-on weatherization training, and horticulture education.

In response to the question of how POP was first initiated, Ms. Holder stated that the New York Parks Department began the Initiative with support from the Mayor's Office who wished to integrate human service assistance into a transitional employment program.

## Day Three

### *Case Management/Data Sharing*

The morning session highlighted strategies for assessing TANF participants and WIA clients to better improve their ability to enter the labor force and move closer to self-sufficiency. A panel included three key individuals and outlined strategies for improving comprehensive case management and integrating client assessment into daily work-readiness activities. The following provides a summary of the presentations.

Opening the session was Tobi Wickham, Administrator for Business Training and Outreach Division, Department of Workforce Services, Wyoming's Job Assist Program, presented on the advantages and disadvantages of public/private partnerships in preparing participants for workforce entry. She began by discussing how analyzing the healthcare data of large organizations such as Texas Instruments, she has been able to provide a critical eye on the allocation of health resources within the organization. She found that of 5% of employees were responsible for 85% of healthcare costs, on average using 12 medications. With this information she was able to develop a health information network, allowing these employees to more effectively use the resources provided to them by their employer. Ms. Wickham suggested taking this logic and applying it to participants in TANF programs. By aggregating all resources in one place, an organization would be able to better position participants to become self-sufficient.

For example, in 2003 a study found that 3% of Wyoming residents were consuming 42% of available state assistance. The typical Wyoming resident who qualified for state assistance was difficult to find and hard to serve. Many were customers of multiple agencies and generally found it difficult to navigate the convoluted system in place for receiving benefits. In order to address these issues, a Healthy Job Ladder was created. This system was designed to help participants move through the system and gain access to the resources they needed to become self-sufficient. Once this framework was in place a caveat presented itself: the health of participants. Participants averaged 3-12 medications and generally did not have access to quality health care. The study found that while they could move successfully through the Ladder, one health issue or accident would set them back significantly. Ms. Wickham stated that a more logical and effective approach would be to first get participants healthy, and then assist with job placement, thus assuring a more stable path to self-sufficiency.

In order to attain this goal, the Wyoming State Governor's Office decided to enter a public/private partnership with HCMS Group LLC, a health information company. Through this partnership, Wyoming was able to create the Wyoming Health Information Network (WHIN), a vibrant data sharing framework that allows cross agency linking of state assistance recipients. This data warehouse is secure, HIPAA compliant and SAS 70 certified. Seven state agencies contributed data.

In conjunction with this project, Wyoming piloted the Healthy Families Succeed Program. This groundbreaking program allows families to have access to all the necessary tools they need to become self-sufficient. This program uses the data collected at WHIN to develop personal action plans for recipients and set overall goals for the program. The primary focus is on physical and mental health, subscribing to the philosophy that if a person can take care of their health they will be better able to take care of their self. The Healthy Families Succeeds Program utilizes job coordinators, nurses, and pharmacists to provide comprehensive support to recipients while facilitating cross agency access.

The Healthy Families Succeed Program is divided into two phases. This program was developed to address the following four critical gaps found in various studies.

- Lack of assistance in coordinating state services on a personal/family level;
- Lack of access to job training and education;
- Need for better coordination between primary medical and mental health care providers; and
- Lack of affordable and accessible health care.

The first phase of the Healthy Families Succeed Program is "Health Assist". This phase was originally piloted in Albany and Laramie counties and will be expanding later in 2010. The second phase of the program is "Job Assist", which was created as a partnership with Health Assist to provide job skill development. This program used the Job ladder and was originally piloted in Laramie County. After a year in the job ladder there was an increase of 22% in employment. Self-reported, self-sufficiency increased by 38.5% and in four months, take home earning had increased by 52.5%.

Healthy Families Succeed will be expanding to four additional counties in 2010 due to TANF funds, allowing HFS to reach an additional 1,600 participants. HFS will be placing job coordinators in DWS offices in expansion counties and Health Assist nurses and pharmacists will be available by phone. There are plans to open an office in a central location. Current enrollment is 367 families with a total of 1,072 household members. Of these, 120 are currently in training. HFS has signed an MOU with DHS to accept all food stamp recipients and has implemented a funding plan modeled after the Workforce Investment Act (WIA). Currently, \$6,000 is budgeted per recipient for them to receive intensive care. Of the 140,000 eligible overall, Healthy Families Succeed estimates that they will find 22,000 who are job eligible.

In the coming months, Healthy Families Succeed intends to solidify the service delivery model in order to become better positioned to expand its services to the entire state. They are also piloting Healthy Frontiers, a Healthcare Reform Pilot, which is designed to provide health insurance to uninsured adults from the Healthy Families Succeed Program. This plan is based on 'incentives alignments' between providers and patients in healthcare services delivery that improves health while reducing costs.

Ms. Wickham closed her presentation by providing the Healthy Families Succeed Web site ([www.healthyfamilinessucceed.com](http://www.healthyfamilinessucceed.com)) and her contact information [twickha@wyo.gov](mailto:twickha@wyo.gov).

Helen Thatcher, Program Manager for Utah's Department of Workforce Services, presented on the best use of resources integrating the Work How Systems Help. Utah administers numerous workforce assistance services including: Workforce Investment Act, Temporary Assistance for Needy Families, Supplemental Nutrition Assistance Program, Unemployment Insurance, Tax Credits – WOTC / WTW, Wagner Peyser (labor exchange), Trade Act, Child Care subsidy and quality, Medicaid, and services for refugees and veterans. In order to manage the information provided by all of these programs and streamline service, Utah has a developed centralized system that manages call centers, direct service, and allows all of the computer systems to talk to each other. Utah uses Contribution Automated Tax System (CATS) and Comprehensive Unemployment Benefits System (CUBS) to administer their unemployment insurance services. In order to determine eligibility, eRep, eShare are used which pulls data from SSA, IRS and DMV, and My Case e-Query.

The case management system used by Utah's Workforce Development Department is UWORKS. UWORKS is designed to include data from TANF, WIA, Refugee, veterans, E & T for SNAP and trade, along with Wagner Peyser and WIA Core. This system is primarily Web based, which allows for maximum accessibility across the

state. Employer job orders are done through UWORKS and 76% of these are placed online by employers. Employers also mediate online; however, there is the option to do this over the phone as well. Seventy-one percent of job seekers exclusively use the online tools; 18% use mediated service provided by core service staff and case managers; while 11% use a combination of services.

UWORKS combines case management and exchange systems in order to allow case managers to be more effective. By being the "Jobs" person, case managers are not only building a stronger relationship with their clients but also more effectively delivering services across the system. The labor exchange system is designed to be able to sort by transportation, allowing the case managers to help clients find positions that meet their specific needs and limitations. In addition, UWORKS can administer TANF and WIA, thus allowing customers to have one employment plan. This system also permits co-enrollment, which allows families to choose the best funding source for their situation. The assessment, financial needs component, and customer communication methods remain the same.

UWORKS also helps determine training eligibility by determining both similarities and differences across programs thereby maximizing the use of data accordingly. The data used for the program is as follows regarding income: TANF is one month; WIA is the past six months; TANF is 200% of poverty; and WIA Lower Living Standard Income Level (LLSIL). The system can match income amounts of LLSIL to TANF Poverty levels allowing the technology to handle the complication. This function of the UWORKS allows for tremendous savings in postage because you can communicate multiple data/issues in one letter. With this system the case manager is able to leverage dollars, by picking and choosing the best services for the individual client. For example, you can expand services by targeting families to the TANF funding and singles to WIA along with co-enrollment in WIA support services like child care and transportation. It also allows the case manager to build reports explaining funding sources.

This system allows management to track obligation of funds by providing standard reports. It is important to communicate with training providers in the same way. By standardizing communication, the chance of miscommunication is reduced. Important factors to consider when designing and integrating these types of system is communication. The system should be simple at the customer/service staff level and be more complex at the administrative level. This will allow the system to be most efficient. It is important to build security into the system to avoid having to make enhancements later. It is also important to include staff that does federal reporting in the design of the system. This will allow them to have input on which fields will allow them to most accurately produce reports in order to effectively partner, make sure that any regulation flexibility is used (e.g. WIA waivers), ensure staff members are trained, make certain that the system is designed with the customer in mind, and generate clear outcomes.

Christina Techico, Program Manager, ICF International, presented on behalf of the United States Department of Health and Human Services, Administration for Children and Families, Office of Family Assistance and Federal Project Officer Al Fleming on the Online Work Readiness Assessment (OWRA). She provided an overview of OWRA, provided some lessons learned, set the stage for using OWRA, showcased the tool, and highlighted its important components. She outlined how the OWRA tool has been found to help TANF programs and other social service programs assess client needs, prepare employability plans, organize service referrals, coordinate training and employment activities, and facilitate follow-up.



Ms. Techico provided background on TANF and discussed that OFA in partnership with State, county, and Tribal TANF programs and other stakeholders have been working to improve the work readiness of low-income and working individuals. To help meet the needs and requirements of TANF, OWRA has been developed by States, Tribes, and county TANF administrators to ensure a more seamless and effective delivery of services to TANF participants, low-income, and working individuals. OWRA is a Web-based suite of resources, tools, assessments and guidelines that have been merged into a single tool in an effort to better streamline work readiness activities and help TANF agency staff, workforce staff, and other case management staff engages participants in work-focused activities leading to long-term self-sufficiency.

As part of the development of OWRA, both in the vision/concept as well as the assessments, significant effort went into understanding the needs in the field as well as what evidence-based research discusses about the importance of assessments. The OWRA tool has a rich history of field testing and validation from two pilots. An initial pilot of a Maryland only based OWRA tool was piloted by ACF from 2006 to 2007 by the

Maryland Family Investment Administration within the Department of Human Resources. The pilot project was tested and verified by the University of Maryland School of Social Work. It served as the basis of validation for the questions, answers, and generated recommendations.

Then, from January to July of 2009, OFA worked with five States and the Quinault Indian Nation in an intensive pilot and gathered evidence on the effectiveness of OWRA to streamline case management activities and modernize assessments for TANF participants. During the pilot process, 784 cases were logged by 87 case managers across the sixteen pilot localities from the six States.

From the pilots, OFA found that OWRA assisted TANF programs specifically, and potentially other social service programs in the gathering of client information. Pilot sites saw a rise in the number of referrals to work supports and services and helped case managers direct participants to more appropriate job retention services. OWRA improved the standardization of assessments which is critical when a population is transient or dislocated. OWRA provides consistency across caseworkers in terms of diagnosing untreated barriers among clients. OWRA develops a strategic and effective roadmap to guide employment planning for clients. The online format streamlines case work activities and helps organize all the information into a single and more user-friendly format. OWRA provides comprehensive employability information, including work activities, work needs, work supports, strengths, and other barriers. Lastly, OWRA has the tremendous potential to increase employability with a clear focus on career development and long-term self-sufficiency because of its comprehensive set of assessments that gauge where your client is and what are possible next steps for moving from point "A" to point "B."

OWRA is user-friendly and assists caseworkers in thinking more holistically about participants' desires, objectives, strengths, and barriers. It helps identify "risk" characteristics resulting in a higher number of referrals for mental health and domestic violence. It encourages dialogue with clients which ensure greater engagement. OWRA

- OWRA is fully customizable to the specific needs of diverse populations and can be used by TANF workers, intake staff, and eligibility workers alike.
- It provides a comprehensive work readiness assessment summary of the participant's strengths and barriers and generates individualized recommendations which help the participant determine appropriate education, training, and employment activities. The OWRA tool provides a list of recommendations and a roadmap which is an important component of the overall self-sufficiency plan.
- OWRA is broken down into four stages that coincide with the four modules of the tool: (1) the initial interview with TANF participants; (2) the development of a tool-based assessment worksheet; (3) analysis of OWRA data; and (4) incorporating OWRA data into individual self-sufficiency planning activities.

generates more buy-in to recommendations among clients—resulting in improved client success in job placements and work activities. OWRA helps to simplify and reduce administrative tasks and keeps all necessary information about their clients in one central location. OWRA assists workers develop a strategy for targeting clients for services. OWRA assists in targeting strategies so that you can make more efficient use of time.

Ms. Techico discussed the current piloting that is focused on the newly developed Modules 3 and 4, which are happening in Fort Belknap Indian Community, South Carolina, Illinois, Maryland, and Washington, D.C. The purposes of the pilot testing are to: (1) Determine the validity of Modules 3 and 4 meeting needs of States, territories, and Tribes; and (2) Verify how Modules 1 and 2 can be used in conjunction with Modules 3 and 4.

In the meanwhile, OFA is working on the National Rollout of Modules 1 and 2. ICF will be working with OFA on rolling out the first 2 modules on the Welfare Peer Technical Assistance Web site. Detailed information on how to download and deploy the tool on individual systems' servers is available by contacting the TANF Program Manager of each Region. In addition, virtual training and technical assistance resources including User Guides to help interested States, counties, and Tribes are available on the WPTA Web site.

### ***Keynote Address - Moving Forward Together: Our Vision for Partnership***

Jane Oates, Assistant Secretary at the United States Department of Labor, Employment and Training Administration and Mark Greenberg, Deputy Assistant Secretary for Policy, United States Department of Health and Human Services, Administration for Children and Families met with participants to discuss the importance of TANF and Workforce collaboration.

Mark Greenberg spoke first on the crucial partnership that exists between ACF and DOL. Both agencies are committed to helping families connect to work and move towards more self-sufficient livelihoods. At ACF, programs are guided by a set of goals: address child poverty, family self-sufficiency, child safety, and reach vulnerable populations. All goals are guided under the principle of interoperability. While ACF has a strong focus on very specific goals, it does not mean they can operate in administrative and political silos. There is an understanding that, in working with DOL and other Federal groups, each agency is driven to work towards common goals. Like DOL, ACF is now focusing heavily on evidence-based practices. In particular, ACF is interested in promising programs that are increasing access to education and skills building as part of an overall goal of moving individuals into jobs that can support a family. Mr. Greenberg also highlighted subsidized jobs and employer engagement as two crucial programs in times of high unemployment. He mentioned how he hopes to work with States over the coming year to determine how best to implement and sustain subsidized employment programs.

As TANF continues to be an important factor in the lives of low-income individuals, ACF wants to hear from local and State practitioners on ways to improve the program. This input is more important than ever as ACF prepares for TANF reauthorization in the near future. Mr. Greenberg mentioned that he has heard from States that TANF measures processes, not outcomes – this is something he hopes to change.

Mr. Greenberg identified the Employment Retention and Advancement Project and Innovative Strategies for Increasing Self-Sufficiency (ISIS) Project as having shown the importance of skill building, career pathways,



and the effectiveness of transitional jobs. He added that there are upcoming opportunities to use TANF resources to assist low-income youth link to work, education, postsecondary education, summer jobs, short-term jobs, support services, work study, and internships. States have a great deal of flexibility in using TANF funds to support these types of programs.

Mr. Greenberg closed by stating his hopes that Congress decides to extend the Emergency Contingency Fund (ECF) and added that everything that is allowable under ECF is also funded under TANF. He thanked all the participants for their commendable efforts and recognized that while ACF and DOL are strongly encouraging cross-agency partnerships, they acknowledge that it is often a monumental and complicated task.

Following Mark Greenberg, Jane Oates acknowledged that both ETA and ACF appointees share a belief in each other's system, though both understand their programs have room for improvement. Ms. Oates addressed the importance Regional, State, and local partners play in providing insight to the Federal offices on what programs are making a positive difference in the lives of low-income individuals. She encouraged ACF and DOL representatives to not let regulatory silos hamper their ability to serve low-income individuals. Ms. Oates added that just placing individuals in jobs is not sufficient. To truly break the cycle of poverty, individuals need to connect with promising models, like transitional jobs, that put low-income populations on a track towards obtaining family sustaining jobs.

As a way to improve the lines of communication and promote collaboration, Ms. Oates encouraged TANF staff to serve as readers on DOL grants. Not only are these paid positions, but it helps ensure that the perspective of hard-to-serve individuals is represented. She closed by stating that collaboration efforts are also in place at the Federal level. This work, while difficult and time intensive, remains critical to the work of ACF and DOL.

At the close of Mr. Greenberg and Ms. Oates presentations, one attendee asked if there was a study in the pipeline that will assess accountability among workforce investment boards and the one-stop system. Ms. Oates answered that there are currently no efforts to examine how well these systems are integrating, and overall, very little information exists on their operational functions.

### *Taking Your Partnerships Home: Turning Knowledge into Practice*

*William Brumfield, ICF International*

William "Bill" Brumfield, National TANF Expert, ICF International, opened the discussion asking people to report on what they have learned during their time in Dallas. He also asked if there were any additional questions. Helen Thatcher noted that, separate from this meeting, in relation to TANF, the assumption is that people speak of cash assistance customers. She stated her position that most TANF money is spent in other ways and relating TANF solely to cash assistance, is incorrect. Furthermore, she stated that millions of TANF dollars are spent on occupational training and highlighted the importance of differentiating how TANF dollars are used.

The following outline questions and additional comments made regarding turning partnerships into practice.

**Question (Bill):** *What are some other things that you have learned over the course of this meeting.*

**Response:** Helen said that there are a couple of things Utah is working on but not perfect at. The Texas model for non-custodial parents is very cool and energized me to start making more efforts in that area including talking more with Wyoming. The ladder and starting with the health issue is intriguing—it totally makes sense and that is so smart. I look forward to learning more about that and seeing what we can do.

**Additional Comments:**

Bill said that he would assume that more states have similar statistics to Utah. He also noted that homeless organizations finally learned that housing first makes a difference and that there are numerous examples of such processes.

**Reagan Miller, Texas:**

As with Utah we are really fortunate because we have a purview of all the programs. We are fortunate in that way. I thought it was interesting when Mark made the comment about data and how dissimilar they are across programs. We are trying to look at the outcomes of all of our populations. I still think it would be nice if federally there could be some similarities (more similarities). I think it would be good to look at opportunities to simplify definitions. The example we always use is monitoring. On the positive side, we are always looking for opportunities to do more. I was really pleased with the HUD discussion and the funding they have available to do that. Someone from Dallas workforce is setting up a meeting with Dallas HUD to see where they can collaborate. So we think there are some great opportunities there.

**Additional Comments:**

Bill addressed the progress with HUD in Texas—helping people move on to the next step—maybe leaving the rental market and getting into permanent housing is an excellent example.

**Arkansas:**

We thought about being more organized over the whole state and bringing in partnerships. One of the things we are talking about is bringing in the Housing Authority and working more closely in partnering. Maybe in some of our rural counties we could bring in DOT. We loved hearing about Utah and their program tracking. We also enjoyed hearing about how the different States used ARRA funds.

We heard before about the TJ initiatives but to hear it again and in this setting is really helpful. We had not started a subsidized employment program using the ECF but we are seriously going to begin a subsidized employment program using our regular funding. This has been a great, great opportunity to network with other States. Arkansas is in the process of selecting a case management system and eligibility system.

**North Dakota:**

We have been talking about when we get back we want to do a partnership with WIA and our foster program and children/family services program. Each one has the same elements and we want to look at how we can best serve that population with our resources. Also, there are some programs within HUD that we are going to try to tap into. One of the bigger things this conference did, for me, was how many agencies are doing some of the same similar things but we are not coming together to work together.

**Additional Comments:**

Bill noted that one of the things that comes to mind when you think HUD, you think Section 8 and we do not look beyond that. There are other things they have available.

**Dave Morey, Montana:**

In Montana, Del and I have talked and think there are several areas we can work in. One that stood out to me was that there is no TANF representation in our one-stop system. TANF is an optional one stop partner, and therefore it is not there. I think it would be a valuable start and easy to accomplish to encourage TANF program reps to be in our one stops. We also talked about at the State level to brief each other and each other's program office on the

respective programs and get those details down, and also at the State level to review funding and cost sharing processes. We right now are operating a TANF funded summer youth program. In thinking back on the deliberations and making arrangements for that to happen, there was a lot of confusion based on language and definitions but we got through it. Del and the department of HHS want to find a way to continue subsidized employment, if not as it is but in similar format. I am sure we could help with that. We also talked about making sure the right people are at the table. The people from Utah talked about not letting the computer system drive the program. We have been finding that our fiscal considerations drive the program. Those are some of our thoughts.

**Additional Comments:**

Bill believes that the summer youth program is one that is right in front of us.

**Wyoming:**

Bill said he thought the discussion on rural areas in Wyoming was interesting. Rural areas have special problems/issues you do not see in other cities.

**Participant:** You are right—we do have some very specific obstacles. We are excited about the collaboration our state will do.

**Question:** Bill asked about green jobs. Does your state not have a lot of focus on energy and green jobs?

**Response:** We actually have not been doing a whole lot of training in the green industries. There have not been opportunities for jobs in Wyoming. We are doing more health care—CAN and dental hygienists.

**Kevin Richards, Colorado:**

We have had a partnership through contract and down through the local workforce centers for Colorado Hires. What was exciting to hear when I met with the workforce center association last week, first of all, they invited us to the table as a regular member. Second, their numbers are exceeding what we expected in terms of achievable goals. I think one of the things we are discussing is the need to take what we learn here and follow through with more regionally. We are asking Felicia to look at that. We will put the connections together for her on the WIA side.

**Question:**

Bill asked if there is TANF representation on the WIB? I am just wondering if having those people together has been effective in the partnerships.

**Response:**

Kevin responded that some of those larger groups are focused on other things. The effect of partnerships comes from our own peer-to-peer relationships.

**Additional Comments:**

Felicia said they are planning for the next quarterly call to get someone from WIA/DOL to work through terminology with them so they can understand the definitions and walk away with something that helps builds those partnerships.

**Sandy Elledge, Oklahoma:**

We feel like we have partnered well on the State level with the Governor's council. I do not think the partnership gets down to engaging the local level as well. It is a new level. One of the things we need is HUD involvement. One of the things coming out of governor's council is we are seeking a statewide key training license, to use that as a

remediation tool. We are trying to do that on a state level so anyone can use it. Also if we did get an extension of the TANF Emergency Contingency funds, we would like to have more emphasis on serving noncustodials. We do have some emphasis, but probably would need to do more marketing.

#### **Additional Comments**

Bill noted that no one has mentioned anything yet with SNAP/Child care. Those are two programs that interact with TANF a lot.

#### **Mark Hodges, Louisiana:**

One of the things we are trying to do right now is have one referral for our SNAP ET class. Mandatory referrals for our TANF work clients to workforce commission. My colleagues here are in the process of trying to work through it. I love all the discussion about common terminologies and how do you get to rules and rights so we can build this program into something that makes a difference for our clients. I was surprised to know that HUD has case management activities. I am also very interested in OWRA and other data sharing activities. Again our plan when we get back is to convene a small workgroup. The last three days we have seen so many different and expanded opportunities for us to do our referrals. We are also seeing the need for case management in our process.

#### **Additional Comments**

A participant stated that the only other opportunity they could add to the TANF program is subsidized employment. It looks like there are a lot of existing programs we could call up and get best practices/lessons learned from. It would definitely improve our current program.

Bill stated that he thought any of the subsidized employment jobs issues is one of the big items going on in DC and talking about policy. One of the issues is how do we provide jobs with these high unemployment numbers. Here is an example of how we can have an effect on people who need that service. That is a nice policy shift. It looks like the system across the country is getting behind that. I think the technology and if you happen to be a SNAP-er, you know about able bodies. There has been a lot of money in the homeless system and there has been the ability to work with the various programs. Someone figured out that you need to first figure out stable housing.

Frank Stluka, ETA Region IV, said he is thrilled to be hearing a lot about building partnerships between ACF and ETA and also reaching out to others. He reiterated the three questions Dr. Curnan brought up. The first is: Who are you serving? Establish you have a shared client/neighbor base. Second: What outcomes do you need to get? How are you measured and how can we make sure it is a win win. And then get into—these are all the services we provide, and line them up to be complimentary rather than disconnected.

#### ***Closing Remarks***

*Larry Brendel, TANF Program Manager, Region VI*

Larry Brendel, TANF Program Manager, Region VI, provided the closing remarks for the conference and recalled that when the initial planning started for the conference there was no thought that there would be such success and such overwhelming support. He thanked the States and remarked that Regional Program Managers and Directors can sit in the regional office and provide technical assistance and good programs and try to get you in touch with people around the country, but it is those on the frontlines that are providing services to individuals and families. He thanked everyone for their hard work to implement successful and innovative programs and thanked the

participants for their support and input in the development of the agenda and the meeting. He thanked all of the speakers and highlighted the energy brought by Commissioner Thurmond who gave the meeting a feeling of change and encouragement and forced people to think about change. He then thanked the Federal partners from DOL, USDA, and HUD and ended by thanking the planning committee—Dr. Felicia Gaither, Frank Stluka, and the ICF staff. Dr. Gaither thanked the participants for taking the time out to be here and told participants to look for additional technical assistance activities in the coming year.

## Summary

In 2010, Congress is scheduled to reauthorize the TANF and WIA programs. Although the number of families receiving TANF has increased just eight percent since December 2007—the official beginning of the current recession—rising from 1,703,656 in December 2007 to 1,832,113 in March 2010<sup>6</sup>, studies conducted by the US Department of Health and Human Services found that average earnings for employed leavers were less than the poverty level for a family of three.<sup>7</sup> Reauthorization offers a fresh opportunity for TANF and workforce to collaborate on strategies to improve the employment outcomes of low-income workers.



Low-income and working families face multiple barriers to self-sufficiency. Food instability, homelessness, education and training, medical costs, domestic violence, substance abuse, and transportation are just a few of the challenges that families face on their journey toward self-sufficiency.

For many years, social services programs have been working to improve services to low-income and working families. These programs have been

discussing and strategizing around methods to increase the available services for communities, families, and individuals, while simultaneously utilizing resources in the most effective and efficient manner. The current recession and welfare reform provided additional impetus to develop better-coordinated social safety nets. Family self-sufficiency is the key to ensuring that fewer families rely on public assistance and the various available resources.

Bringing together diverse service providers, stakeholders, and programs, melding their resources, and expanding their reach are essential to reducing the impact of fragmentation on the lives of individuals already facing multiple barriers. While each program may have different outcomes and offer different services, these service agencies are inextricably linked and are increasingly interdependent.

The 2010 Administration for Children and Families Regions VI and VIII meeting was held in Dallas, Texas, at the Westin- Galleria. The meeting which was a partnership between the Employment and Training Administration Region IV contained a series of targeted discussion forums, interactive plenary sessions, and peer-to-peer breakouts. This year's meeting included a variety of vision, strategy, and tactics sessions and provided a backdrop for the development and/or nurturing of improved partnerships between the TANF and workforce worlds. Over the two and one-half days, attendees were exposed to a variety of sessions presented by more than 20 distinguished experts and peers from the TANF, workforce, social service, and research communities.

<sup>6</sup> [http://www.acf.hhs.gov/programs/ofa/data-reports/caseload/caseload\\_current.htm#2010](http://www.acf.hhs.gov/programs/ofa/data-reports/caseload/caseload_current.htm#2010)

<sup>7</sup> See: *TANF "Work First" Policy Helps Perpetuate Single Mother Poverty and Employment in Low Wage Women's Work.* The Women's Legal Defense and Education Fund, 2010; Lower-Basch, Elizabeth and Mark Greenberg (2008). *Single Mothers in the Era of Welfare Reform.* Center for Law and Social Policy, Washington, DC; ICF International (2009). *Promising Practices—Responding to Increasing TANF Caseloads.* Welfare Peer Technical Assistance Network, US Department of Health and Human Services, Washington, DC.

## Appendices



## Client Success through Partnership: 2010 State TANF and Workforce Meeting

Tuesday, July 27 - Thursday, July 29, 2010



Monday, July 26, 2010

3:00 pm to 6:00 pm	Check-In and Registration		
7:00 am to 8:30 am	Networking and Registration		
8:30 am to 12:00 pm	Workforce Directors' Meeting  San Antonio Room	Region VI- TANF Administrators' Meeting Austin 1- Breakout Room	Region VIII- TANF Administrators' Meeting Austin 2- Breakout Room
12:00 pm to 1:15 pm San Antonio Room	<p>Working Lunch Keynote Address: <i>TANF and Workforce Services: The Importance of Partnership</i></p> <p><b>Michael L. Thurmond</b>, Commissioner, Georgia Department of Labor</p>		
1:15 pm to 2:15 pm	Workforce Directors' Meeting (cont'd)  San Antonio Room	Region VI- TANF Administrators' Meeting (cont'd) Austin 1- Breakout Room	Region VIII- TANF Administrators' Meeting (cont'd) Austin 2- Breakout Room
2:15 pm to 3:30 pm	<p><b>TANF 101 FOR WORKFORCE STAFF</b></p> <ul style="list-style-type: none"><li>• Overview</li><li>• Purposes of TANF</li><li>• Uses of Federal &amp; State Funds</li><li>• Work Requirements</li><li>• TANF Emergency Fund</li></ul> <p><b>Felicia Gaither</b>, TANF Program Manager, U.S. Department of Health and Human Services, Administration for Children and Families, Region VIII</p> <p><b>Charlotte Bristow</b>, TANF Program Specialist, U.S. Department of Health and Human Services, Administration for Children and Families, Region VI</p> <p>San Antonio Room</p>	<p><b>WORKFORCE 101 FOR TANF STAFF</b></p> <ul style="list-style-type: none"><li>• Overview</li><li>• National Program Priorities</li><li>• Eligibility</li><li>• Performance</li><li>• One-Stop Career Centers</li><li>• Referral Process</li></ul> <p><b>Kajuana Donahue</b>, Workforce Development Specialist, U.S. Department of Labor, Employment and Training Administration, Region IV</p> <p><b>Rebecca Sarmiento</b>, Workforce Development Specialist, U.S. Department of Labor, Employment and Training Administration, Region IV</p> <p>Austin 1- Breakout Room</p>	
3:30 pm to 3:45 pm	Break		
3:45 pm to 4:45 pm San Antonio Room	<p><b>Presentation: Administrative Guidance</b></p> <p><i>This session will provide information on administrative needs such as memoranda of understanding, cost allocation, tracking of fund usage and participant activity, maintenance of effort requirements, grants administration, and program accountability.</i></p> <p><b>John Allen</b>, Workforce Development Specialist, U.S. Department of Labor, Employment and Training Administration, Region IV</p> <p><b>Charlie Watts</b>, Accountant, U.S. Department of Labor, Employment and Training Administration, Region IV</p> <p><b>Janice Caldwell</b>, Team Leader, U.S. Department of Health and Human Services, Administration for Children and Families, Region VI</p>		
4:45 pm to 5:00 pm San Antonio Room	Day One Wrap-Up and State Reflections		
5:00 pm to 7:00 pm	ACF- Regions VI and VIII & ETA- Region IV Networking Reception		



## Client Success through Partnership: 2010 State TANF and Workforce Meeting

### Tuesday, July 27 - Thursday, July 29, 2010



Wednesday, July 28, 2010

7:30 am to 8:00 am San Antonio Room	Daybreak Networking
8:00 am to 8:15 am San Antonio Room	<p>Welcoming Remarks</p> <p><b>Leon R. McCowan</b>, Regional Administrator, U.S. Department of Health and Human Services, Administration for Children and Families, Region VI</p> <p><b>Joseph C. Juarez</b>, Regional Administrator, U.S. Department of Labor, Employment and Training Administration, Region IV</p>
8:15 am to 9:15 am San Antonio Room	<p>Keynote Address: <i>What Makes Partnerships Work?</i></p> <p><b>Susan Curnan</b>, Director, Center for Youth and Communities, Brandeis University</p> <p><i>Professor Curnan will provide a research-based and practical view of successful partnerships and outline strategies for developing, maintaining and strengthening partnerships. She will discuss the keys to facilitate client success, and what makes partnerships work in the human services.</i></p>
9:15 am to 10:15 am San Antonio Room	<p>Presentation: <b>Expanding Our Repertoire, Expanding Our Partnerships</b></p> <p><i>This session will bring together other agencies and programs to discuss ways in which they have been collaborating with DOL-ETA and TANF agencies. Participants will also discuss ways to enhance cross-agency collaboration at the Federal, State and local levels for the purpose of serving shared clients in a more holistic manner to improve their success. Attendees will be able to engage the speakers and their peers about the importance of expanding partnerships with other human service agencies.</i></p> <p><b>Rebecca Lucero</b>, Civil Rights Director – Food and Nutrition Service, United States Department of Agriculture (USDA) - Southwest Region</p> <p><b>Charles Eldridge</b>, Public Housing Revitalization Specialist, United States Department of Housing &amp; Urban Development (HUD)</p> <p><b>Gerald Jenson</b>, Senior Community Planning and Development Specialist, United States Department of Housing &amp; Urban Development (HUD)</p> <p><b>Peggy Crist</b>, Director of Planning &amp; Program Development, Federal Transit Administration United States Department of Transportation (DOT)</p>
10:15 am to 10:30 am	Break
10:30 am to 12:00 pm	<p>Concurrent Presentations</p> <p>Each of these breakout sessions will allow time for attendees to engage in the discussion and share with peers and presenters individual experiences, promising strategies, and challenges within the specific topical area being discussed during the session. Each session will be repeated to ensure that participants are able to learn and share with presenters and peers.</p> <p><b>Session One: Serving TANF Eligibles</b></p> <p><i>This session will highlight some promising strategies for working with TANF participants during tough economic times and will showcase three programs—North Dakota PRIDE/FOSTER and Oklahoma Adult and Youth Subsidized Employment—that are using the Recovery Act's TANF Emergency Funds to enhance the States' subsidized employment efforts in both the public and private sectors. Participants will hear firsthand accounts and employer testimony about current employment trends and expansion in both the public and private sectors.</i></p> <p><b>Carol Cartledge</b>, Director of Public Assistance, North Dakota Department of Human Services</p> <p><b>Trina Gress</b>, Chief Operation Manager, Community Options, North Dakota</p> <p><b>Susan Gunsch</b>, Manager, Workforce Programs, North Dakota Workforce Services</p> <p><b>Linda Hughes</b>, TANF Program Manager, Oklahoma Department of Human Services</p> <p>San Antonio Room</p>



## Client Success through Partnership: 2010 State TANF and Workforce Meeting

### Tuesday, July 27 - Thursday, July 29, 2010

#### Session Two: Strengthening Programs through Partnership

*This session will showcase two programs that work with multiple partners to address the needs of the low-income population. The Arkansas Career Pathways program provides an alternative post-secondary training service delivery model for higher education tailored to low-income adult students and their unique needs. The program allows them to gain jobs and become self-sufficient. The Texas NCP Choices program helps non-custodial parents with substantial barriers to become economically self-sufficient while also making consistent child support payments.*

**Phil Harris**, TANF Assistant Director, Arkansas Department of Workforce Services  
Arkansas Career Pathways

**Nicole R. Verter**, Director, Workforce Policy and Program Assistance, Texas Workforce Commission  
Texas Non-Custodial Parents (NCP) Choices Program

**Michael Hayes**, Deputy for Family Initiatives, Child Support Division, Office of the Texas Attorney General

Austin 1- Breakout Room

#### Session Three: Integrated Services Delivery

*YouthBuild is a youth and community development program that simultaneously addresses core issues facing low-income communities: housing, education, employment, crime prevention, and leadership development. Family Pathfinders of Tarrant County is an integrated service delivery program made up of volunteers and representatives from several social service agencies, whose mission is to strengthen the community by empowering low-income families to bridge the gap from poverty to self-sufficiency.*

**David Clauss**, Program Director for the Casa Verde Builders – Austin  
American Youth Works, Austin, Texas

**Tracey Polson**, YouthBuild Program Coordinator, Community Development Support Association of Enid, Oklahoma

**Peggy Badlato**, Program Manager, Family Pathfinders of Tarrant County, Inc., Texas

Austin 2- Breakout Room

12:00 pm to 1:15 pm

Lunch on your own

1:15 pm to 2:45 pm

[Yellow Box]

2:45 pm to 3:00 pm

Break

3:00 pm to 4:30 pm  
San Antonio Room

#### Presentation: Maintaining Work Programs for Our Clients

*This session will focus on using subsidized, transitional, and supported work programs to move participants into the labor force. The discussion will emphasize innovative strategies for developing and maintaining subsidized work programs, and improving long-term employment outcomes. Attendees will be able to share with peers and presenters individual experiences, promising strategies, and challenges with using subsidized employment and transitional jobs.*

**Chris Warland**, Program and Policy Liaison, National Transitional Jobs Network, Heartland Alliance for Human Needs & Human Rights, Chicago, Illinois

**Eva Greenwalt**, Program Manager, Department of Commerce, Community Economic Opportunities Unit – WorkFirst Programs- Washington Community Jobs, Seattle, Washington

**Annika Holder**, Chief, Parks Opportunity Program (POP), New York, New York

**Elizabeth Ehrlich**, Program Operations and Client Services, Parks Opportunity Program, New York, New York

4:30 pm to 4:45 pm

Day Two Wrap-Up and State Reflections



## Client Success through Partnership: 2010 State TANF and Workforce Meeting

### Tuesday, July 27 - Thursday, July 29, 2010



Thursday, July 29, 2010

7:00 am to 8:00 am	Daybreak Networking
8:00 am to 9:30 am San Antonio Room	<p>Presentation: Case Management/Data Sharing</p> <p><i>This session will highlight promising strategies for assessing TANF participants and WIA clients to better improve their ability to enter the labor force and move closer to self-sufficiency. The panel will outline strategies for improving comprehensive case management and integrating client assessment into daily work-readiness activities. Attendees will be able to engage their peers and the presenters on case management and data sharing in the delivery of comprehensive services important to case management, assessing client needs, and sharing vital client data/information with partner agencies.</i></p> <p><b>Tobi Wickham</b>, Administrator for Business Training and Outreach Division, Department of Workforce Services, Wyoming's Job Assist Program</p> <p><b>Helen Thatcher</b>, Program Manager, Utah Department of Workforce Services, Workforce Development Division, UWORKS Program</p> <p><b>Christina Techico</b>, Senior Manager, ICF International, Online Work Readiness Assessment (OWRA)</p>
9:30 am to 10:00 am	Break/Hotel Check-Out
10:00 am to 11:15 am San Antonio Room	<p>Keynote Address: <i>Moving Forward Together: Our Vision for Partnership</i></p> <p><b>Jane Oates</b>, Assistant Secretary, United States Department of Labor, Employment and Training Administration</p> <p><b>Mark H. Greenberg</b>, Deputy Assistant Secretary for Policy, United States Department of Health and Human Services, Administration for Children and Families</p>
11:30 am to 1:00 pm San Antonio Room	<p>Working Lunch: <i>Taking Your Partnerships Home: Turning Knowledge Into Practice</i></p> <p><i>State TANF and Workforce partners will sit together during lunch for the purpose of sharing information learned throughout the conference. This session will engage participants in turning newly acquired knowledge into strategies for increasing future prospects and success for families and children served by the TANF and Workforce programs in their respective states.</i></p> <p>Facilitator: <b>William Brumfield</b>, ICF International</p>
1:00 pm	Adjourn



## Client Success Through Partnership: 2010 State TANF and Workforce Meeting



### Speaker List

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### Speaker List

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## Client Success Through Partnership: 2010 State TANF and Workforce Meeting



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## Client Success Through Partnership: 2010 State TANF and Workforce Meeting



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Tax Performance System (TPS)	Gayle/Gerald
Trade Team: TRA and ATAA (coordinate w/DWI and TAA)	Gerald/Keith/Noel
UI Call Center Management	Robert /Maridale/Brian
WIRED Team	Bob (member)
Wage Record Interchange System, National Directory of New Hires, and SSA Crossmatch	Bob/Theresa/Gayle

## Division of Workforce Investment (DWI)

	Name	Telephone
<b>Division Chief:</b>	<b>M. Frank Stluka</b>	<b>972-850-4622</b>
<b>Staff:</b>	Felecia Blair	972-850-4643
	Marilyn Brandenburg	972-850-4617
	Bernie Cutter	972-850-4618
	Kajuana Donahue	972-850-4613
	Catherine Fern	972-850-4689
	Cynthia Green	972-850-4619
	Doug Harris	972-850-4614
	Carolyn Marshall	972-850-4679
	Bill Martin	972-850-4635
	Jesus Morales	972-850-4616
	Lisa Rosendale	972-850-4641
	Rebecca Sarmiento	972-850-4621
	Linda Shaw	972-850-4623
	Roseana Smith	972-850-4615
	David Williams	972-850-4141
<b>Specialty Area:</b>		
	ARRA Governance/WIA Reauthorization	Roseana/Marilyn
	EPSS (grant modification initiators)	Felecia & Rebecca
	Monitor Advocate / MSFW / Agricultural Team	Jesus/Bernie
	One Stop 2.0	Cynthia/Marilyn/Carolyn
	Regional Response Team <ul style="list-style-type: none"> <li>o Rapid Response/WIA-ARRA Dislocated Workers</li> <li>o Trade Team (with DWS)</li> <li>o National Emergency Grants</li> </ul>	Kajuana/Bill/Doug/Carolyn
	Reemployment (UI/WIA/W-P Integration) (with DWS)	Kajuana/Jesus
	Sr. Community Service Employ't Prog. (SCSEP)	Cynthia/Doug/Carolyn
	Technical Assistance & Training Coordinator	Bill: Lead
	Veterans Services (backup to DFMAS lead)	/Dave: ARRA NEG'S
	Wagner-Peyser/ARRA Employment Service	/Dave/Carolyn/Felecia: OJT NEG'S
	WIA/ARRA Adult Programs	Felecia: RIG/BRAC
	WIA/ARRA State Plan Modifications (PY2009)	/Roseana: "other NEG" backup
	WIA/ARRA Youth/Shared Youth Vision	Rebecca/Catherine
	WIA/ARRA Waivers	Marilyn/Rebecca/Alex (OSID)
	Work Opportunity Tax Credit (WOTC)	Lisa/Kajuana
		Bernie
		Jesus/Cynthia
		Rebecca/Bill/Catherine
		Marilyn/Cynthia
		Bernie/Linda/Lisa
		Roseana/Doug
		Marilyn/Cynthia/Linda

**DWI State Liaisons (and backups)**

<b>Arkansas</b>	Kajuana Donahue (Dave/Doug/Jesus)
<b>Colorado</b>	Bill Martin (Carolyn/Marilyn/Cynthia)
<b>Louisiana</b>	Marilyn Brandenburg (Carolyn/Bill/Cynthia)
<b>Montana</b>	Jesus Morales (Dave/Kajuana/Doug)
<b>New Mexico</b>	Roseana Smith (Linda/Bernie)
<b>North Dakota</b>	Doug Harris (Linda/Jesus/Kajuana)
<b>Oklahoma</b>	Felecia Blair (Catherine/Rebecca)
<b>South Dakota</b>	Bernie Cutter (Catherine/Roseana)
<b>Texas</b>	Rebecca Sarmiento (Lisa/Felecia)
<b>Utah</b>	Cynthia Green (Linda/Bill/Marilyn)
<b>Wyoming</b>	Felecia Blair (Catherine/Roseana/Bernie)

## Office of Special Initiatives and Demonstration

	<b>Name</b>	
<b>Director</b>	<b>John Bartlett</b>	<b>972-850-4611</b>
<b>Division Chief:</b>	<b>VACANT</b>	<b>972-850-4602</b>
<b>Staff:</b>		
	Michael Augustus	972-850-4649
	David Baker	972-850-4647
	Brie Burleson	972-850-4652
	Amanda Denogean	972-850-4664
	Pat Evans	972-850-4644
	Ronald Fleming	972-850-4602
	Cynthia Joseph	972-850-4645
	Terry Moore	972-850-4669
	Alex Nerangis	972-850-4674
	Terry Showalter	972-850-4654
	Christopher Watkins	972-850-4651
<b>Specialty Area:</b>		
	Community Based Job Training Grants	Pat/Michael
	Briefing Books, State	State Lead & Backup FPO
	Disability Program Navigator Grants	David/Amanda
	Earmark Grants	Pat/Chris
	Faith Based & Community Based Grants	Terry/Brie
	Geographic Information Systems/Asset-Mapping	David
	High Growth Job Training Grants	Cynthia/Pat
	Homeless Initiative	Michael/Brie
	Limited English Proficiency	Michael/Amanda
	National Farmworkers Jobs Program Grants &	
	Regional Agricultural Services Team	Amanda/Terry
	MIS (Internal): Calendar, Travel-Work Plan, Grants-by-State and Grants-by-FPO Databases	David/Cynthia
	Prisoner Reentry Initiative Grants	Chris/David
	Significant Activities Report	Brie/Terry
	Youth Grants	Cynthia/Brie
	WIRED Team Representatives	Cynthia/Pat
	SCSEP National and Pilot Grants	Brie/Terry
	E-Procurement Initiators	Pat/Cynthia/Amanda
	ARRA-Funded OSID Staff	Ron/Alex/Terry

**OSID State Leads/Backups:**

<b>State Team</b>	<b>Team Member</b>	<b>State Responsibility</b>	<b>Telephone</b>
AR, MT & ND	Amanda Denogean David Baker	Arkansas Montana & North Dakota	972-850-4664 972-850-4647
CO, LA, & Utah	Cynthia Joseph Terry Moore Brie Burleson	Louisiana Utah Colorado	972-850-4645 972-850-4669 972-850-4652
NM, SD, & Wyoming	Michael Augustus Chris Watkins	South Dakota & Wyoming New Mexico	972-850-4649 972-850-4651
TX & OK	Pat Evans Chris Watkins	Texas Oklahoma	972-850-4644 972-850-4651



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- NEW Tribes include – NM: Mescalero Apache and Pueblo of Zuni  
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**Client Success Through Partnership  
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Dallas, Texas**

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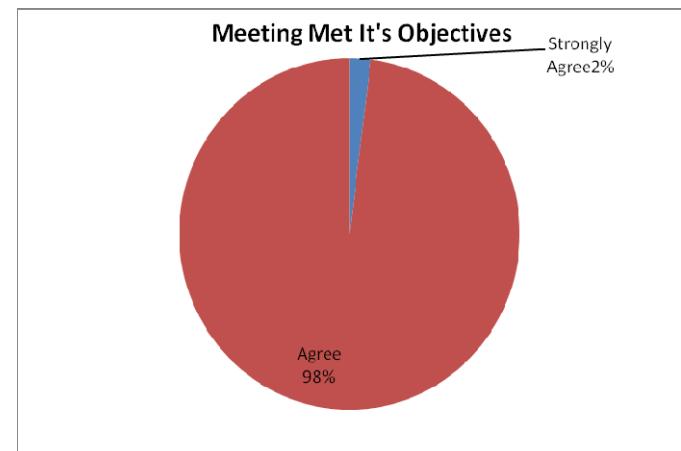
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## Evaluation Summary

The 2010 Administration for Children and Families Regions VI and VIII meeting was held in Dallas, Texas, at the Westin- Galleria. The meeting which was a partnership between the Employment and Training Administration Region IV contained a series of targeted discussion forums, interactive plenary sessions, and peer-to-peer breakouts. This year's meeting included a variety of vision, strategy, and tactics sessions and provided a backdrop for the development and/or nurturing of improved partnerships between the TANF and workforce worlds. Over the two and one-half days, attendees were exposed to a variety of sessions presented by more than 20 distinguished experts and peers from the TANF, workforce, social service, and research communities. Highlights of the evaluation results reveal the following:

- Most attendees agreed or strongly agreed that the sessions were informative and met their objectives;
- General comments about the meeting and the sessions were positive and complimentary and focused on potential follow-up activities and technical assistance. Attendees were pleased about the diversity of topics—although at times a little overwhelming—that were available at the meeting.
- Suggestions for additional topics for technical assistance and follow-up covered a range from better collaboration, improved performance measurement, program sustainability, and accessing peer-to-peer resources.
- Recommendations for future meeting formats included repeating sessions, providing more opportunities for small group work and peer networking, allowing time for more Q and A, and more online resources or the development of an online *portal* of the numerous meeting resources.
- For the most part, attendees were satisfied with the Westin-Galleria and the Dallas location. Recommendations included a better control of the temperature and more available handheld microphones for use during sessions.



One hundred and fifty-seven individuals registered for the conference and 118 registrants attended the meeting. Of the 118 attendees, 58 meeting evaluations were completed, which represented 49 percent of the total meeting attendees. Overall, the meeting was well-received with more than 93 percent of attendees “agreeing” that the meeting met its objectives and 93 percent believed that the information presented in the sessions was relevant, valuable, and helpful within the realm of creating partnerships between TANF and Workforce Services.

Additionally, attendees were asked to provide responses to a series of questions about the meeting and provide recommendations for future meetings and technical activities. Some individuals took the time to write responses to the questions and many of those comments are below. The highlight of the meeting was the range of topics and speakers and the information presented and how it related to TANF and workforce programs.

In conclusion, the 2010 *Client Success through Partnership: TANF and Workforce Meeting* was a success. Participants recognized the hard work of the conference coordinators and appreciated the delicacy of putting together a meeting of this nature during the current economic climate. Attendees valued the wealth of information and believed that the presenters were well prepared. More importantly, attendees were left with a new appreciation for the important connections between TANF and WIA and seeds were sewn for improved client success through partnership.