



TANF Works!

TANF/WIOA
COLLABORATION SERIES
2019 - 12

Lehigh Valley, Pennsylvania

TANF/WIOA COLLABORATION

Since the passage of the Workforce Innovation and Opportunity Act (WIOA) in 2014, many state Temporary Assistance for Needy Families (TANF) and workforce system leaders have focused efforts to coordinate client services serving low-income or vulnerable populations. WIOA makes TANF a mandatory partner unless the Governor opted out. Coordination efforts are meant to improve service delivery and reduce duplication.

FIGURE 1: Lehigh Valley Geographic Map



This brief highlights emerging TANF and WIOA agency collaboration practices between TANF and the American Job Center in Lehigh Valley, Pennsylvania in the following areas:



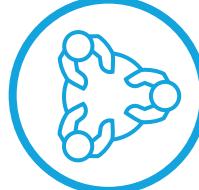
Joint Service Delivery

by organizing teams by function instead of by program, co-enrolling, and conducting joint client workshops



Resource Sharing

through co-location and integrated funding



Shared Learning

through an integrated universal database, cross-training staff, and a shared data entry team to manage and improve data quality



Managing Collaborative Activities

through resource-sharing agreements, leadership and stakeholder buy-in, and creating team agreements for each functional team

Local Services Overview

TANF workforce services in Lehigh Valley are offered primarily through the Employment Advancement Retention Network (EARN) at PA CareerLink® Lehigh Valley (PA CareerLink®), the local American Job Center. EARN is a comprehensive program, including employability skills training, placement assistance, and opportunities for on-the-job training. While EARN is a TANF-specific program, participants can access programs funded by both TANF and WIOA (among other funding streams) through EARN. Clients follow five basic steps to access workforce services:

1
Step

TANF clients begin receiving EARN's services by signing up for cash assistance, either online through COMPASS (Pennsylvania's centralized online benefits tool) or by visiting a County Assistance Office (CAO).

The CAO determines clients' TANF eligibility and assigns them to a case worker, who develops an agreement with the clients outlining their mutual responsibilities and obligations.

2
Step

Clients eligible to work are then referred by CAO to the PA CareerLink® to receive workforce services.

They retain their case worker at CAO, who handles the technical details of a case related to TANF eligibility, changes in status, and minimum requirements. One of the region's two CAOs is located at PA CareerLink®, which allows TANF clients referred to the PA CareerLink® to stay in the same building to receive their employment support services.

3
Step

Clients are then assigned to an EARN "Career Advisor" who keeps track of clients' required work activities and coordinates their child care and transportation.

They create an individual service plan for each client that charts a pathway towards employment, including referrals for barrier removal, training, or education services. EARN Career Advisors specialize in EARN but often have split funding and the capacity to support WIOA adult clients.

4
Step

All EARN clients participate in employment skills workshops, called You're Hired, which cover employer expectations, interview skills, and how to complete job applications.

The program features daily sessions that repeat each week and can be taken in any order. The classes are taught by a team of education instructors who are funded by TANF, WIOA Adult and Dislocated Worker, and WIOA Out of School Youth (OSY), allowing them to run workshops for any program-attached client. All classes include participants from the EARN, WIOA Adult, and WIOA OSY programs. While EARN clients are required to attend You're Hired workshops to meet work participation requirements, WIOA Adult, Dislocated Worker, and OSY clients are strongly encouraged to attend.

5
Step

EARN participants are assigned to a "Recruiter" who helps EARN participants and clients from other programs find employment.

The Recruiters have sector-specific expertise and work one-on-one with clients to help them complete job applications or find On-the-Job Training (OJT) opportunities. After EARN participants find a job, they are considered successful graduates of the program. The EARN program also includes six months of follow-up. During this time clients can continue to earn some cash assistance and other supports if they maintain their attachment to the program.



JOINT SERVICE DELIVERY

Lehigh Valley's PA CareerLink® has structured its staff and workshops by function so they can serve clients from multiple programs.

Teams organized by function instead of program.

PA CareerLink® staff are organized by staff members' functions,

rather than by program function. Functional teams increase coordination, encourage an exchange of ideas and expertise across programs, and facilitate knowledge about requirements and eligibility. Staff from different teams acquire expertise in different areas—such as assessment, education, or employment—so they can support clients as they move towards employment. Organizing teams by function also makes it easier for clients to navigate the system, as they do not need to keep track of different program names and funding streams to know where to go to receive services.

As shown in **FIGURE 2**, the teams in Lehigh Valley include:



FIGURE 2: Lehigh Valley PA CareerLink® Teams

Lehigh Valley moved to functional teams in late 2013. Each team drafted its own “team agreement,” which outlines the team’s goals and plan to work together. These agreements are especially helpful for teams that have staff from different employers. In these situations, formal supervisors may be different from their functional team supervisors.

Functional teams physically sit near each other, which allows EARN and WIOA staff to easily communicate. Staff are placed strategically by activity to support customer access and customer-centric service delivery. For instance, the Welcome Team’s cubicle is next to the welcome and intake area, while the Career Development Team’s education instructors sit near the classrooms.

Joint client workshops. EARN and WIOA (Adult, Dislocated Worker, and OSY) staff in Lehigh work together to plan and facilitate the “You’re Hired” courses. They recently started requiring clients from WIOA Adult, Dislocated Worker, and WIOA OSY programs to participate in these workshops. Staff

report that requiring workshop participation has helped maintain a structured, work-like week and strengthened EARN and WIOA clients’ relationships with staff and the program itself.

Co-enrollment. The Lehigh In School Youth (ISY, operated by three local partners: Children’s Home of Easton, Penn State University Lehigh Valley, and St. Luke’s University HealthNetwork) program is operated entirely with TANF funding. However, its eligibility, program structure, and performance benchmarks mirror those of the WIOA ISY program. As for adult clients, they may be co-enrolled in both EARN and WIOA. The Lehigh area facilitates co-enrollment by having EARN case workers learn the WIOA general eligibility criteria so they can pre-screen their clients.

Shared provision of client services. Staff in Lehigh from EARN, WIOA Adult, Dislocated Worker, and WIOA OSY are cross-trained in basic eligibility and requirements for other programs so that they can more easily assist a range of clients. Staff are jointly funded (discussed further in the next section), which allows them to provide a variety of services to clients from each of the programs.



RESOURCE SHARING

Joint funding and locations has helped EARN and WIOA programs coordinate services for clients.

Integrated funding. Lehigh staff are jointly funded by the different programs, allowing them to serve a variety of clients, including EARN and non-EARN participants.

Co-location. The EARN and WIOA (including OSY) program are both located at the PA CareerLink®. Recently, the Lehigh County CAO moved to the same building as its PA CareerLink®. CAO and EARN staff report that co-location has increased the take-up of EARN services and informed EARN staff about how and when work gets accomplished at CAO. For example, EARN staff learned about the best times to reach a CAO case manager, and that CAO staff set aside time for paperwork when they are not supposed to take calls or interact with clients. EARN staff also learned about CAO processes and how information gets routed. They learned how to provide clients a quicker response, either by coaching clients to leave a voicemail for CAO or entering the information into an online request form.



SHARED LEARNING

Lehigh Valley has implemented new ways to share data, resources, and training across programs.

Integrated universal database. PA CareerLink® Lehigh Valley hired a private developer to create an integrated universal database that pulls client information into one system. Staff from all programs can access these data and pull cross-program reports, so clients do not need to give basic information to multiple programs and staff. Lehigh also revamped their paper filing system to mirror the database to make it easier for all staff to locate information.

Data entry team. A Quality Assurance Team inputs EARN program data from the EARN database (CWDS, which only records case notes) into the universal database (along with data from other programs). This data entry process reduces the EARN staff's workload and gives them more time to focus on clients. It also increases data quality because protocols help ensure that data are consistently entered into both databases. The Quality Assurance Team is also responsible for completing follow-up calls with clients (after they are placed in jobs) and inputting this information into the database.

Information-sharing across programs. Lehigh's functional teams and intentional seating arrangements allow EARN staff to share resources and information with their WIOA counterparts. For example, WIOA has begun to serve more clients with barriers to employment such as a lack of housing. WIOA case workers can learn from EARN case workers, who have more experience working with clients with significant barriers to employment and can offer resources and advice. EARN case workers also can learn from WIOA case workers about how to best structure and offer occupational skills training.

Staff meetings and cross-training. Lehigh has a strong meeting culture. Staff meet regularly across programs, functional, and management teams, and hold monthly all-staff and functional team meetings. Staff report that they have frequent informal interactions with others on their team, outside of their scheduled meetings. All Lehigh staff are cross-trained on the basics of EARN, WIOA, and OSY programs (along with other programs, such as the Office of Vocational Rehabilitation (OVR), Veterans, and Re-employment Services and Eligibility Assessment (RESEA) programs). If a client walks in and the case worker for their program is unavailable, a manager from any other program can help the client.



MANAGING COLLABORATIVE ACTIVITIES

PA CareerLink® partners, functional teams, and leaders have been involved in outlining and managing the goals of their partnerships.

Agreements to manage collaboration. The Pennsylvania Workforce Development Association (PWDA) members oversee the workforce development system in the state and serve as a clearinghouse for workforce development information across PA's Regional Workforce Boards. The individual Workforce Boards within the PWDA have contracts and agreements in place to manage collaboration. A memorandum of understanding (MOU) formalizes the split funding structure and the different roles of all the partners at the PA CareerLink®. The Resource Sharing Agreement establishes how the PA CareerLink® building is managed and shared by each partner. Each functional team has a "team agreement" in place to establish their overall goals and steps to accomplish these goals.

Leadership making partnerships happen. Lehigh Valley leaders have been a driving force in moving from multiple programs to a workforce "system" with functional teams. The PA CareerLink® leaders are passionate about collaboration, taking risks to make partnerships happen and encouraging the team to do the same. Leaders have long advocated for integrated service delivery and worked with state-level policymakers to improve policies

that affect their programs. For instance, the Workforce Board's Executive Director advocated to get the CAO to occupy the same location as its PA CareerLink® headquarters.

Leaders from the functional teams come together to discuss PA CareerLink® operations, identify program changes, and troubleshoot problems. For example, through these meetings, the team decided to make the You're Hired program mandatory in Lehigh Valley for all clients receiving Individualized Career Services, not just for EARN clients. In addition, the cross-program management group spearheaded the Management Information System (MIS) for tracking attendance and an Outlook and Excel system that alerts education instructors to new clients. Frontline staff involvement in building team agreements also help build relationships and trust across program staff in the functional teams.



Collaboration is tough. It was tough here. We're in a very good place now, but it doesn't happen overnight. You've got to stay the course. You've got to keep professing and living the mission statement: people [clients] are more alike than unlike one another, and everybody needs career readiness basic skills. That's why we work together: to provide the broadest and best services possible.

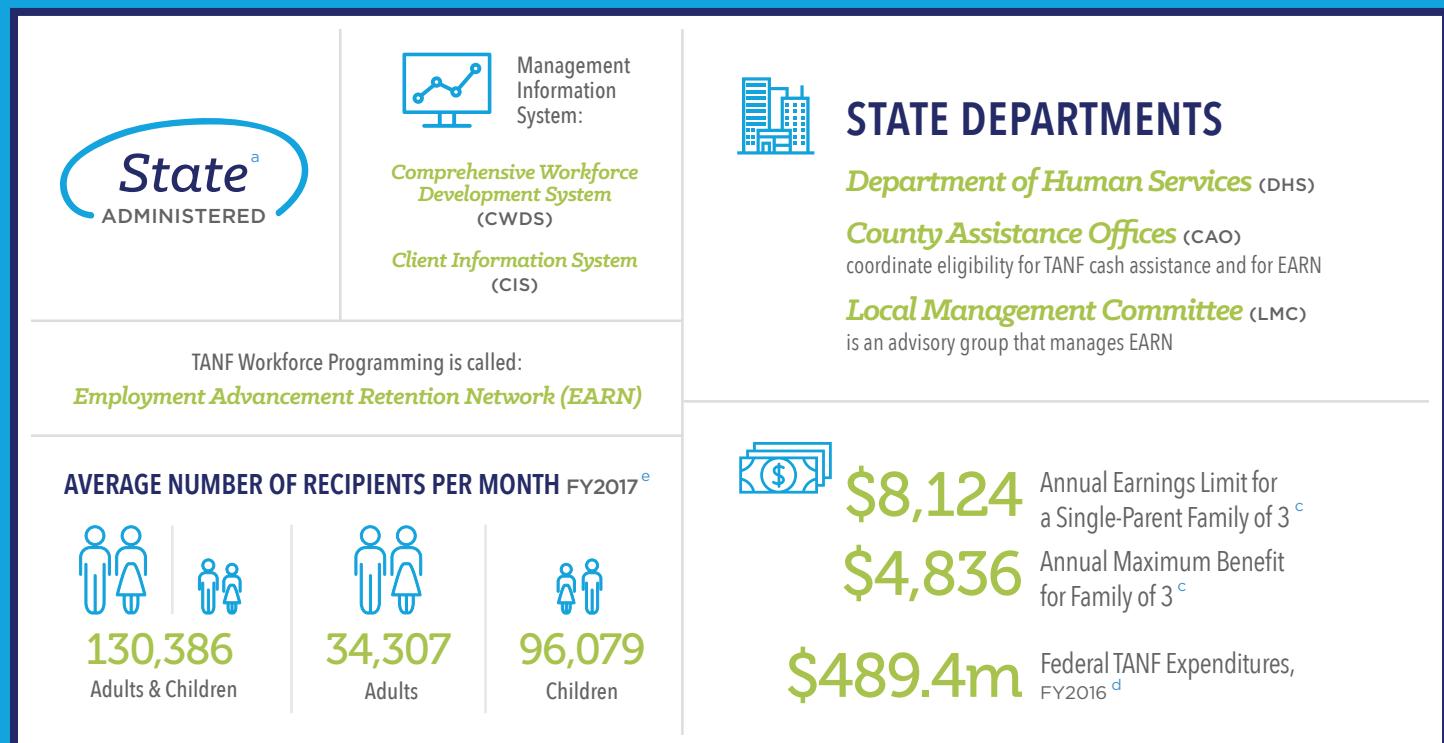
- PA CAREERLINK® LEHIGH VALLEY LEADERSHIP

TANF And WIOA Eligibility and Services in Pennsylvania

TANF. Approximately 34,000 of Pennsylvania's low-income adults are enrolled in TANF, where the annual earnings limit for a single-parent family of three is \$8,124 (SEE TABLE S.1). Employment Advancement Retention Network (EARN) is the

name of the program that supports work for TANF recipients in the state. TANF clients can access a variety of work support, training, and education programs, depending on the type of services they need. Each path is managed by a different agency, with funding from a variety of sources, including TANF, WIOA Title I, WIOA Title II, and WIOA Title III.

TABLE S.1: Pennsylvania TANF Snapshot



SOURCES: (a) A Descriptive Study of County- versus State-Administered Temporary Assistance for Needy Families Programs (https://www.acf.hhs.gov/sites/default/files/opre/county_tanf_final_report_submitted_to_acf_b508.pdf); (b) TANF Caseload Data 2017 (<https://www.acf.hhs.gov/dfa/resource/tanf-caseload-data-2017>); (c) Temporary Assistance for Needy Families (TANF) Cash Assistance (http://www.nccp.org/profiles/PA_profile_36.html); (d) TANF Financial Data in FY 2016 (<https://www.acf.hhs.gov/dfa/resource/tanf-financial-data-fy-2016>)

WIOA. Most WIOA-funded services are available to individuals in Pennsylvania because of dislocation status or income eligibility, but many programs prioritize serving low-income individuals or those having one or more barriers to employment. The main WIOA services offered to job seekers statewide include labor-exchange/job search assistance,

individualized career services, work readiness preparation, adult basic education, and occupational skills training. Some WIOA-funded programs also offer supportive services such as child care, transportation, tools and equipment, and uniforms. TABLE S.2 provides a snapshot of WIOA in Pennsylvania.

TABLE S.2: Pennsylvania TANF Snapshot

 Combined ^a PLAN	One-Stop Job Centers:  PA CareerLink®	 Management Information System:	Commonwealth Workforce Development System (CWDS)
 GOVERNOR-APPOINTED BOARD OVERSEEING WIOA^b <i>Bureau of Workforce Partnership and Operations (BWPO)</i> administers federal and state workforce programs funded by WIOA	 2017 ALLOTMENTS^c	\$26.1m Employment Service (Wagner-Peyser) Federal Appropriation	\$29.4m WIOA Adult Federal Appropriation

SOURCES: (a) Workforce Innovation and Opportunity Act (WIOA) Combined State Plan (<https://www.dli.pa.gov/Businesses/Workforce-Development/Documents/Pennsylvania%20WIOA%20Combined%20State%20Plan%2012-28-15.pdf>); (b) Program Year (PY) 2017 Workforce Innovation and Opportunity Act (WIOA) Allotments; PY 2017 Wagner-Peyser Act Final Allotments and PY 2017 Workforce Information Grants (<https://www.federalregister.gov/documents/2017/06/15/2017-12336/program-year-py-2017-workforce-innovation-and-opportunity-act-wioa-allotments-py-2017-wagner-peyser>

Resources

- **Workforce Innovation and Opportunity Act Overview:**
<https://www.doleta.gov/WIOA/Overview.cfm>
- **USDHHS OFA PeerTA TANF/WIOA Resource Hub:**
<https://peerta.acf.hhs.gov/ofa-initiative/426>
- **USDOL TA Hub:**
<https://ion.workforcegps.org/>

This brief is based primarily on conversations conducted in spring-summer 2018 with WIOA and TANF program staff in the Lehigh Valley region, Workforce Board Lehigh Valley, and their local service partners. For more information about the content in this brief, contact Nancy Dischinat (Executive Director, Workforce Board Lehigh Valley) at ndischinat@workforcelv.org. Kyla Wasserman (MDRC) and Audrey Hathorn (Public Strategies) were the IIESS site visit team members.

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The Integrating Innovative Employment and Economic Stability Strategies (IIESS) initiative of the Office of Family Assistance (OFA), under contract number HHSP2337005T, publishes briefs and materials that document the collaboration between Temporary Assistance for Needy Families (TANF) and public workforce systems under the Workforce Innovation and Opportunity Act (WIOA). This material is intended to encourage peer learning among state and local actors so that low-income individuals can effectively access employment and family support services.