



ADMINISTRATION FOR
CHILDREN & FAMILIES
Office of Family Assistance

OFA Regions V-VIII State TANF Virtual Meeting

July 19–21, 2022 • 11:00 a.m.–2:30 p.m. CT

Concurrent Session: Refocusing the Customer Experience Across the TANF Journey

Days 1 and 2, 11:20 a.m.-12:30 p.m. CT



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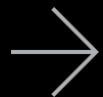
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Speakers for Today's Session

Courtney Barthle, Senior Director, Poverty Solutions, ICF

Jerrard Johnson, Director, Great Lakes Bay Michigan Works

Erin Oalican, Director, Reach Up – Vermont TANF Program



Customer-Focused Case Management in TANF

Principles for authentic engagement

Courtney Barthle
Senior Director, Poverty Solutions



Why?

Centering the customer:

- Respects their inherent dignity.
- Creates a programmatic environment in which customers are empowered to craft their own journey to economic mobility.

What?

Customer focused case management is an operational strategy and set of tools that:

- Centers the customer as the primary decision-maker.
- Casts case managers and customers as collaborators.
- Recognizes and responds to holistic individual and family needs.
- Respects lived experiences and cultural norms.
- Uses trauma-informed approaches.
- Harnesses the power of data for continuous improvement.

How?

Moving toward customer focused is facilitated by:

- Establishing coaching as case management.
- Implementing holistic appraisal.
- Employing motivational interviewing techniques.
- Recognizing and responding to secondary traumatic stress.



Traditional Case Management	Customer-Focused Case Management
Use of screening tools to determine participant eligibility and barrier identification	Use of assessments to identify participant strengths and goals
Imposition of organizationally driven plans and timelines with an emphasis on compliance	An interactive process focusing on self-identified participant goals & success measures
An agency/case manager driven action plan	A participant owned and driven action plan
A case manager – participant relationship characterized by one way communication to the participant	A case manager – participant relationship characterized by rapport, authenticity and trust

➔ **Traditional vs. Customer-Focused Case Management**



MICHIGAN
WORKS!
Great Lakes Bay Region





Improving The Client Experience

- Increase our virtual options
- Introduce Goal4 It!
- Forms reduction



Increase Virtual Options

- Offer virtual orientations
- Offer virtual workshops
- Providing virtual services



What is Goal4 It!?

An evidence-informed, customer-centered framework for setting and achieving goals in human services



What is Goal 4It!?

Focuses on improving outcomes for children and families
using 3 primary strategies:

- Reduces external sources of stress
- Creates responsive relationships within and beyond the program
- Strengthens core life skills



What is Goal4 It?

Focuses on **self-regulation** as a four-step problem-solving framework:

- **Goal**: define a meaningful goal
- **Plan**: create a detailed plan
- **Do**: execute the plan
- **Review & Revise**: review progress and revise the goals or the plan



Implementation Process

Road Test with Career Coaches/Participants:

- Road test was conducted over a 4-week period
- Career Coaches chose 4-5 participants for the road test
- Surveys conducted with staff and participants



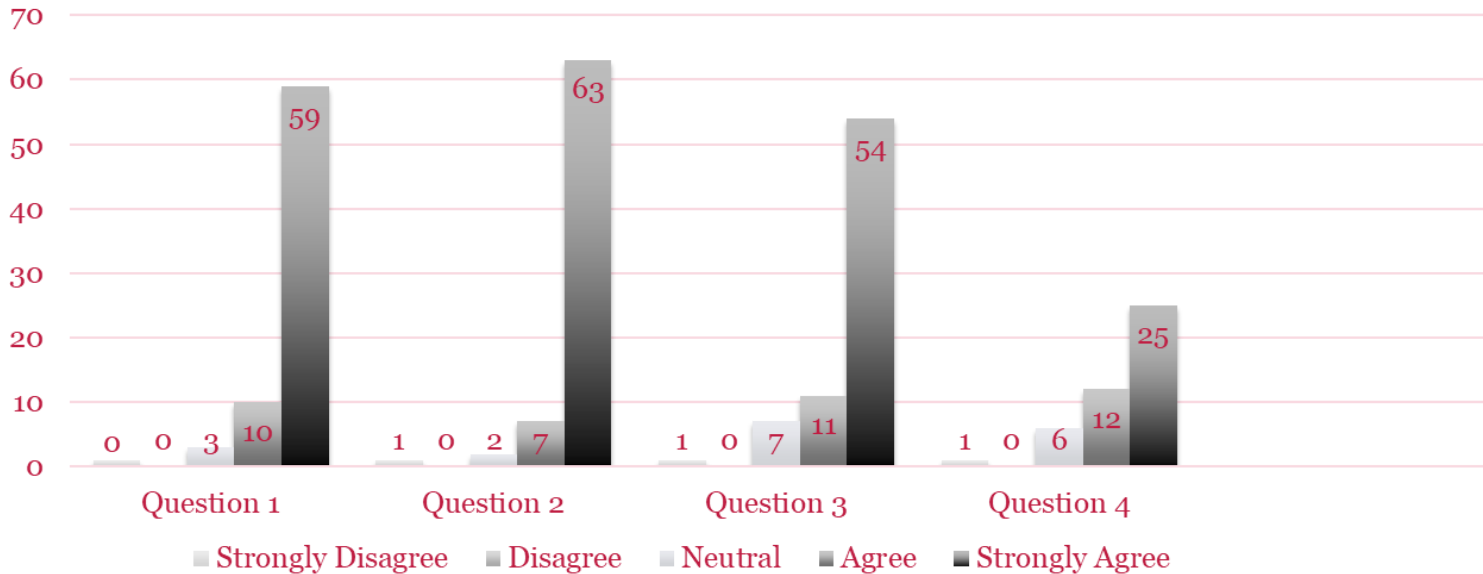
Implementation Process

Survey Questions

- Question 1 - The tools and forms we used in the meeting were simple and easy to understand
- Question 2 - I felt comfortable speaking with my Career Coach about my goals
- Question 3 - The meeting helped me build a stronger relationship with my Career Coach
- Question 4 - The meeting helped me identify and make progress on goals that are important to me



Participant Survey Results





Participant Feedback

- “I feel a greater sense of togetherness with my peers/co-workers as a result of this program.”
– *Program Participant*
- “I am so grateful for my Career Coach.” “She is honestly as sweet and helpful as can be. I’m excited to work with her further. Thank you so much.” – *Program Participant*
- “I feel as if my goals are the number one priority and my Career Coach understands and expresses that.” – *Program Participant*



Staff Feedback

- “My people have been much more engaged...They were kind of lost at first, but now that they’re into it, they really like it... I really like that it empowers them, and they feel like they’re going to get something out of it this time.” – *Career Coach*
- “I’ve heard from participants that they’re really happy that it doesn’t feel like a punishment for needing assistance, but someone is actually helping me find what I want to do and go out and do it. And they are doing it!” – *Career Coach*



Forms Reduction

Analyzed the 196 documents across six Great Lakes Baby Michigan Works! Programs

- Modify the content and format of 14 forms
- Combined 41 forms into 5 redesigned forms
- Eliminate 34 forms
- Redesign 19 forms and made them section 508 compliant in English and Spanish
- Created 11 fillable forms in English
- Created 10 fillable forms in Spanish



Next Steps



Reach Up – Vermont's TANF Program



Reach Up

Reach Up Mission:

Reach Up joins families on their journey to overcome obstacles, explore opportunities, improve their finances and reach their goals.

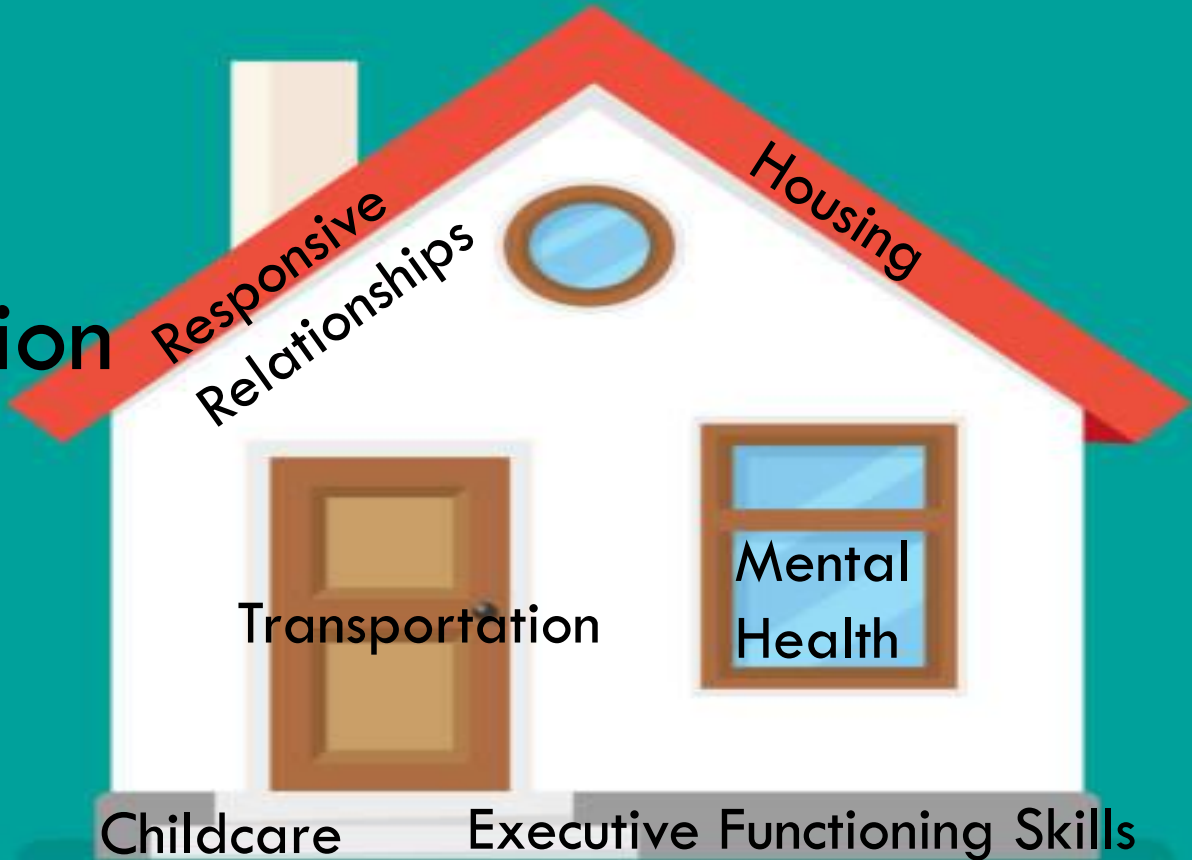
Reach Up Vision:

*Families will be empowered,
connected and thriving.*

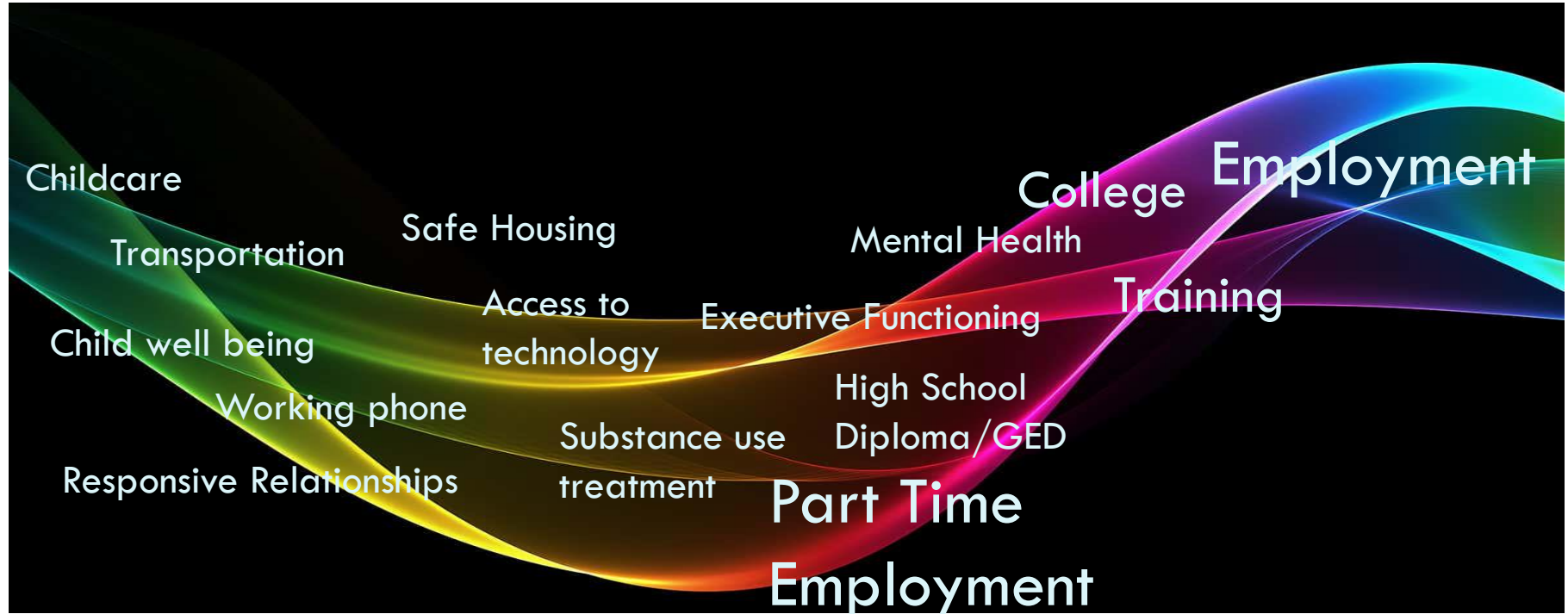
Reach Up Frameworks

- Mission and Vision-Driven
- Trauma-Responsive
- Goal-Oriented Coaching Approach
- Science-Informed

A Sturdy Foundation



Employment Spectrum





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Q & A Session





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Thank you!