



URBAN PARTNERSHIPS FOR WELFARE REFORM

Academy Final Report

Prepared by:

Bradley Myles
Research Assistant

Courtney Kakuska
Associate

Dr. Jeanette Hercik
Project Manager

Caliber Associates
10530 Rosehaven Street
Suite 400
Fairfax, Virginia 22030
Tel: (703) 385-3200
Fax: (703) 385-3206

U.S. Department of Health and Human Services
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The following report describes the Urban Partnerships for Welfare Reform Academy that took place in Dallas, Texas from February 2-4, 2003 at the Fairmont Hotel-Dallas. The Academy agenda is included as Appendix A; Appendix B lists the Academy participants and speakers; and Appendix C summarizes the Academy Evaluations.

TABLE OF CONTENTS

	<u>Page</u>
I. ACADEMY OVERVIEW	1
II. BACKGROUND: WELFARE REFORM.....	2
III. ACADEMY SESSIONS	6
1. WELCOMING SESSION	6
1.1 Introductory Speakers	6
1.2 City Introduction and Puzzle Icebreaker.....	7
2. KEYNOTE ADDRESS AND DINNER.....	8
2.1 Introduction.....	8
2.2 Summary of President Bush’s Proposal.....	9
2.3 The Work Participation Rate	15
2.4 Questions and Answers.....	18
3. TEAM BUILDING SESSION.....	21
4. THE ACADEMY FRAMEWORK: PURPOSE, MISSION, AND FOCUS.....	21
4.1 Developing a Strategy for Effective Service Delivery	22
4.2 Continuum of Service	22
4.3 The Power of Information.....	24
5. CITY PROFILES AND PROMISING PRACTICES	25
5.1 Atlanta.....	25
5.2 Baltimore.....	26
5.3 Detroit	28
5.4 Grand Prairie.....	29
5.5 Miami.....	30
5.6 Minneapolis.....	31
5.7 Oakland.....	32
5.8 Omaha	33
5.9 Seattle.....	34
5.10 St. Louis	35
6. ACADEMY LUNCHEON: AMERICA’S FAMILY	37
6.1 Program Description	37
6.2 Questions and Answers.....	39

TABLE OF CONTENTS (CONT.)

	<u>Page</u>
7. CITY DIALOGUE.....	41
8. CONTINUUM OF SERVICE—NEW COMMUNITY RESOURCE PANEL.....	43
9. CITY CLUSTER BREAKOUT SESSION—THE CASE STUDY	47
10. ACADEMY DINNER: ENGAGING EMPLOYERS	48
10.1 Bank of America: America Works Initiative.....	48
10.2 Integrated Health Services, Inc.....	49
10.3 Questions and Answers.....	49
11. DRIVING PERFORMANCE IN URBAN HUMAN SERVICE PROGRAMS.....	51
11.1 Program Description.....	51
11.2 Questions and Answers.....	55
12. CITY-TEAM PLANNING	57
13. ACADEMY LUNCHEON: THE ROLE OF FOUNDATIONS	58
13.1 The Annie E. Casey Foundation: Family Economic Success Program....	58
13.2 Partnerships between the Philanthropic Sector and Government.....	59
13.3 Questions and Answers.....	61
14. BUILDING BETTER PROGRAMS: PEER TO PEER	62
14.1 Next Steps: Urban Partnerships with ACF	62
14.2 Next Steps: City-to-city Collaborations.....	66
14.3 Next Steps: Each Team in Their Home City	67
15. CLOSING SESSION: FINAL THOUGHTS.....	68

I. ACADEMY OVERVIEW

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The Administration for Children and Families (ACF) Office of Family Assistance (OFA) and Office of Community Services (OCS), and the Office of the Assistant Secretary for Planning and Evaluation (ASPE), jointly sponsored this three-day Academy entitled *Urban Partnerships for Welfare Reform* as one component of the overall Urban Partnerships Initiative. In addition to Federal resource personnel and staff from the aforementioned Federal agencies, attendees of the Academy largely included teams of individuals from various government agencies, community organizations, and employers representing each of the ten cities. After an application, review, and selection process, these ten cities were chosen for Academy participation to assist them in addressing the needs of their TANF population. The Academy provided a forum for peers to share information about their experiences, their promising strategies, and their program models used in addressing the needs of TANF families. The Academy included presentations from senior Federal policy-makers, discussions of innovative approaches for meeting the needs of hard-to-serve TANF families, and a series of exercises to help forge constructive partnerships between and within the city-teams. As a broader goal, the Academy sought to help participants work together to develop preliminary strategic plans to improve the continuum of service offered to TANF families. Teams worked to operationalize the concept of managing for results and focused efforts on developing more holistic and integrated service delivery plans. This report summarizes the main points discussed in the various Academy sessions.

II. BACKGROUND: WELFARE REFORM

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Since the passage of the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (PRWORA), a strong economy backed by government policies emphasizing work has brought about dramatic declines in the number of families receiving welfare. While welfare caseloads have been declining dramatically nationwide, the rate of decline has been slower among urban welfare rolls. Between 1994 and 1999, the number of families in urban county welfare caseloads dropped by 40.6 percent as compared to 51.5 percent nationwide (The Brookings Institution, Center on Urban & Metropolitan Policy, 2000). As a result of this trend, State welfare caseloads are increasingly concentrated in urban areas.

TANF families living in urban areas face a number of unique challenges. Cities have different types of workers, jobs, and attitudes about work and welfare. Given that families on welfare are increasingly concentrated in urban areas, it is vital to gain a better understanding of how the places that welfare families live affect their employment opportunities, their barriers to self-sufficiency, and the well-being of their children. Additional challenges converging for recipients in urban areas include:

Location of Jobs—There is a spatial mismatch between where workers live and where jobs are located, and low-income workers often have no easy way to travel between home and work (Pugh, 1998). Welfare recipients often live great distances from new low-skill job opportunities. A majority of recently filled jobs for less-skilled workers are located in the suburbs of the metropolitan areas, while most low-income persons reside in the central cities (The Brookings Institution, Center on Urban & Metropolitan Policy, 2001).

Transportation—Inner city residents' ability to access low-skill jobs depends heavily on the location of these jobs as well as the extent of private car ownership and the availability of local public transit in these areas. Because many available jobs have relocated to the outlying suburban areas, where they generally are not accessible by public transit, these jobs are not viable options for TANF recipients living in central cities.

Housing—It has become increasingly difficult to find affordable housing that does not consume excessive portions of family income. In 1999, approximately 5 million households with incomes below 50 percent of the local area median income paid more than half of their income for housing or lived in severely substandard housing (HUD, 2001). These low-income families are particularly vulnerable to economic downturns.

Concentrated Poverty—Urban areas with higher levels of concentrated poverty tend to have higher concentrations of the State welfare caseload. Concentrated poverty is associated with illiteracy, chronic unemployment, substance abuse, school dropout, and teenage pregnancy and out-of-wedlock births (The Brookings Institution, Center on Urban & Metropolitan Policy, 1999). People in these neighborhoods often face

barriers of poor schools, weak job information networks, and scarce employment opportunities (The Brookings Institution, Center on Urban & Metropolitan Policy, 2000).

These barriers also have direct impacts on the children living in these areas. Children who live in central cities are twice as likely to be at high risk of negative adult outcomes (such as poverty and unemployment) as suburban children, and half as likely to be at low-risk as their suburban counterparts. In 1996, almost one urban child in five was ‘at-risk’ of poor adult outcomes, a fifty percent increase since 1976 (Sawhill & Chadwick, 1999).

Welfare is increasingly becoming an urban issue and, as such, strategies specific to families living in urban areas must be developed and implemented. An increasing share of TANF recipients have begun facing their 60-month Federal TANF time limit, TANF agencies need to work collaboratively with other State, city, and neighborhood organizations to identify and address the unique needs of welfare recipients living in urban areas, finding ways to both empower urban communities and provide suburban job access. Systems that have historically remained separate and distinct—workforce development and training, economic development, transportation, housing, education, child care, domestic violence, substance abuse, mental health, and child welfare/youth development—will need to work together on integrated solutions to effectively assist low-income families living in urban areas (Capitani, et. al, 2001).

In response to these trends, the Department of Health and Human Services Administration for Children and Families Office of Family Assistance (OFA) and Office of Community Services (OCS), along with the Office of the Assistant Secretary for Planning and Evaluation (ASPE) funded the Urban Partnerships for Welfare Reform Initiative. The purpose of the Urban Partnerships Initiative is two-fold:

To convene an Academy of key stakeholders from ten urban areas to develop strategies to meet the needs of TANF families living in their cities. This meeting was designed to provide a forum for developing partnerships among agencies that serve low-income populations and to build a network of shared and consolidated resources to improve services to families.

To provide follow-up technical assistance to the cities to support the development of relationships between systems, to identify and remove barriers to collaboration between those systems, and to develop strategic plans to address the needs identified by the communities during the Academy.

The Urban Partnerships Initiative will build on the strengths and assets already present in urban communities. The Academy and technical assistance will assist cities with identifying and accessing some of these resources, and with developing partnerships to meet the needs of TANF families.

The first phase of the Urban Partnerships Initiative, the Academy took place in Dallas, TX from February 2-4, 2003, and is summarized in the remainder of this report.

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III. ACADEMY SESSIONS

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Academy sessions included various presentations by senior Federal officials, presentations by each of the ten city-teams, panel discussions, team-building activities, and cluster breakout sessions. The following sub-sections of this report summarize these Academy sessions.

1. WELCOMING SESSION

Mr. Leon McCowan, Regional Administrator, ACF Region IV

Mr. Andrew Bush, Director, Office of Family Assistance

Mr. Don Winstead, Deputy Assistant Secretary for Human Services Policy, Office of the Assistant Secretary for Planning and Evaluation

Ms. Lois Bell, Division Director of State and Territory TANF Management, Office of Family Assistance

Dr. Jeanette Hercik, Caliber Associates

Mr. Leon McCowan, the Host Regional Administrator from Dallas Region VI and moderator of the welcoming session, began the Academy with introductory remarks and words of welcome for all participants and speakers. With reauthorization of TANF looming in the near future, Mr. McCowan stressed that challenging times lay ahead for Federal, State, and local TANF agencies. To illustrate this point, Mr. McCowan commenced the Academy with a quote from Dr. Martin Luther King. “The ultimate measure of a man is not where he stands in the moment of comfort,” Mr. McCowan read, “...but where he stands in the times of challenge and controversy.” With this charge in mind, Mr. McCowan pointed out that the present Academy was an opportunity to share best practices and for States to receive Federal guidance as the changes resulting from TANF reauthorization come into effect. Mr. McCowan ended his brief remarks with an introduction of both Federal speakers, Mr. Andrew Bush and Mr. Don Winstead.

1.1 Introductory Speakers

Mr. Andrew Bush, the Director of the Office of Family Assistance, added his words of welcome and warm wishes for the success of the Academy. He then framed the purpose of the Academy by emphasizing what he felt to be the main question presently confronting welfare agencies: case management. Mr. Bush conceded that there was a time and place for rich policy debate about the complex issues surrounding TANF reauthorization, but he stressed that this Academy was about management, not policy. Mr. Bush believed that the main structure of what

America wants out of its welfare programs is already in place. For him, the larger question is one of learning how to most effectively manage and reduce caseloads within the existing policy structure, not change the structure itself. “This is a conference about management,” he stated, “...what the cities are doing, what they could do, and what they could do better.” Mr. Bush’s goal for the Academy was to establish an environment where the city-teams could network, learn from, and consult with each other. He outlined the role of the Federal presenters at the Academy to be one of introducing tools and providing contexts. Mr. Bush ended his introductory comments with the message that this Academy was only going to be the beginning of the Urban Partnerships that the Federal agencies will try to create. On-site technical assistance provided by Caliber Associates to each of the ten cities will occur in the months following the Academy.

Following Mr. Bush’s introductory message, Mr. Don Winstead, the Deputy Assistant Secretary for Human Services Policy within the Office of the Assistant Secretary for Planning and Evaluation, completed the welcoming session with his goals and objectives for the Academy. He first stated the main concerns of his agency to be policy development and research. In his job, he asks how policies fit together across programs and how research can further inform policy-making. Yet, Mr. Winstead stressed that research is important to him only to the extent that it is used to improve programs and performance and gives the States better tools to serve families. He viewed this Academy as a chance for dialogue and discussion that will provide the cities with the right tools to help people by implementing good programs. He wanted this unique blend of ten urban teams to provide an opportunity for local and State welfare workers to forge relationships and partnerships with their counterparts in other similar cities. With such a venue, he sought to develop a bonded peer group that did not exist prior to the Academy. Moreover, Mr. Winstead noted that although the country has witnessed a tremendous decline in welfare caseloads since the passage of PRWORA in 1996, urban caseloads have been particularly resistant to change. Hence, much work remains to be done in reducing caseloads in urban areas. Mr. Winstead ended his welcoming thoughts with the message that the Federal officials were “here to listen.” He stressed that the most important part of the Academy is the opportunity for the city-teams to talk to each other and then go back to their individual cities with the knowledge that they have gained.

1.2 City Introduction and Puzzle Icebreaker

Following the two welcoming addresses, Ms. Lois Bell, the Division Director of State and Territory TANF Management within the Office of Family Assistance, acknowledged the people who played an integral role in planning this Academy such as Ms. Lisa Washington-Thomas, Mr. Al Fleming, Mr. Jim Gatz, and Ms. Brenda Benesch. She also introduced Dr. Jeanette Hercik of Caliber Associates, the facilitator of the upcoming Puzzle Icebreaker activity.

Ms. Bell ended her remarks with a charge for the Academy participants to “learn a lot, network a lot, get each other’s business cards, and please have some fun.”

Dr. Hercik facilitated the ‘icebreaker’ session of the Academy, which was in the form of a puzzle that each city-team had to complete. First, she thanked Academy participants for coming, acknowledged each city-team’s hard work in preparation for this event, and reviewed the format of the Academy binder and Academy agenda. She reiterated the message that this Academy was convened for the ten city-teams to learn from each other and form partnerships with each other. To spark the development of such bonds, Dr. Hercik then lead the group in a Puzzle Icebreaker activity. Each of the ten city-teams was given a small ten-minute puzzle to complete as a team. Upon completion, the back of each puzzle contained three written clues about the city-team with which they would be paired as a ‘sister-city’ for the evening. One clue was a demographic fact, the second was a TANF-related fact, and the third was a fun fact of general trivia.

City-teams completed this puzzle activity for the following 10-15 minutes and then introduced themselves to their sister-city. Team leaders of each city announced their newly discovered sister-city and read the three fun facts for the room to hear and learn. Later in the evening, sister-cities were encouraged to meet in one of their designated “team suites” to engage in a breakout session together. Sister-city pairs were identified as follows: Oakland-Miami, Seattle- Minneapolis, Omaha-Baltimore, Grand Prairie-Detroit, and Atlanta-St. Louis.

2. KEYNOTE ADDRESS AND DINNER

Mr. Grant Collins, Chief of Staff, Office of Family Assistance

Mr. Don Winstead, Deputy Assistant Secretary for Human Services Policy, Office of the Assistant Secretary for Planning and Evaluation

Mr. Andrew Bush, Director, Office of Family Assistance

2.1 Introduction

After a short break for dinner, Mr. Grant Collins, Chief of Staff of the Office of Family Assistance, began the evening session Keynote Address with his introductory remarks. He listed the various States with which he has had the opportunity to work since he started with the Federal administration in October 2001. Mr. Collins reflected on his travels from State to State as he worked with various State partners on issues related to TANF implementation. He then articulated the purpose of the evening’s keynote address. For the next hour and a half, Academy participants were to hear about the Administration’s welfare reform proposal from senior Federal

officials Mr. Don Winstead and Mr. Andrew Bush. This was the evening to lay everything out on the table and get States' questions answered, so all Academy attendees could move forward with the business of building better programs.

Lastly, Mr. Collins recounted the events leading up to TANF reauthorization such as the eight 'listening sessions' that Federal officials conducted throughout the country in October 2001 that led to over five thousand public suggestions and comments. In February of 2002, President Bush announced his welfare package entitled "Working Toward Independence." Between that date and April 2002, Mr. Collins participated in forty-three TANF management roundtable discussions during which he fielded questions about the President's proposal. In mid-May of 2002, the House of Representatives passed HR-4737. Tonight's discussion was to focus on the next phase of welfare reform and the critical challenges that lay ahead for urban areas.

Mr. Don Winstead continued the history of reauthorization by picking up where Mr. Collins left off. After the House passed HR-4737, the bill was passed to the Senate. The Senate developed an alternative version of the bill, but the bill never made it to the floor of the Senate. Hence, Mr. Winstead noted, the process of TANF reauthorization was not completed last year. Mr. Winstead explained that the TANF program is operating under a continuing resolution that extends funding through March 31, 2003.

2.2 Summary of President Bush's Proposal

Mr. Winstead focused his comments on a summary of seven of the main tenets of President Bush's welfare proposal. As Mr. Winstead re-stated them, these seven main tenets and their respective sub-points are outlined in this section of the report.

Tenet 1: Strengthen the Federal-State Partnership

Maintain current levels of the TANF block grant. The program will be reauthorized at \$16.5 billion annually for fiscal years 2003-2007.

Continue State maintenance of effort. The current law requirement that States maintain their contributions to families and children will be retained.

Continue supplemental grants. Supplemental Grants will be restored at \$319 million annually to states that experience high population growth or had historically low funding levels.

Ease limitations on services for the unemployed. The definition of welfare "assistance" will be clarified so States will have more flexibility in providing help to working families.

Reauthorize and improve the Contingency Fund. The \$2 billion Contingency Fund will be reauthorized to help States during a recession. Modifications are made to ease the ability of States to use these funds. Particularly due to State budget crises, Mr. Winstead articulated that this provision was intended to make the Contingency Fund more accessible to States.

Allow States to designate “rainy day funds.” A provision will be included that makes it easier for States to save money for future recessions.

Increase State flexibility regarding carried-over funds. States will be given greater flexibility in the use of funds carried-over from one year to the next.

Restore full transfer authority to the Social Services Block Grant. States will once again be allowed to transfer up to ten percent of TANF funds to the Social Services Block Grant program.

Maintain high level of commitment to child care. \$2.7 billion will be provided annually for entitlement child care funding and \$2.1 billion for discretionary funding. This means that, when combined with TANF and other Federal sources, historically high levels of child care funding will be available.

Concluding his comments, Mr. Winstead stressed that although many States are experiencing fiscal difficulty, in terms of TANF money, we are starting off in this cycle in better shape than in 1996 because the caseload is down. The country is witnessing decreased caseloads, increased available funding, and increased flexibility to use that funding. Mr. Winstead speculated that the TANF block grant would be reauthorized at a budget of \$16.5 billion dollars through FY 2008. He also speculated that the supplemental grants to States would be reauthorized at \$319 million dollars through FY 2008.

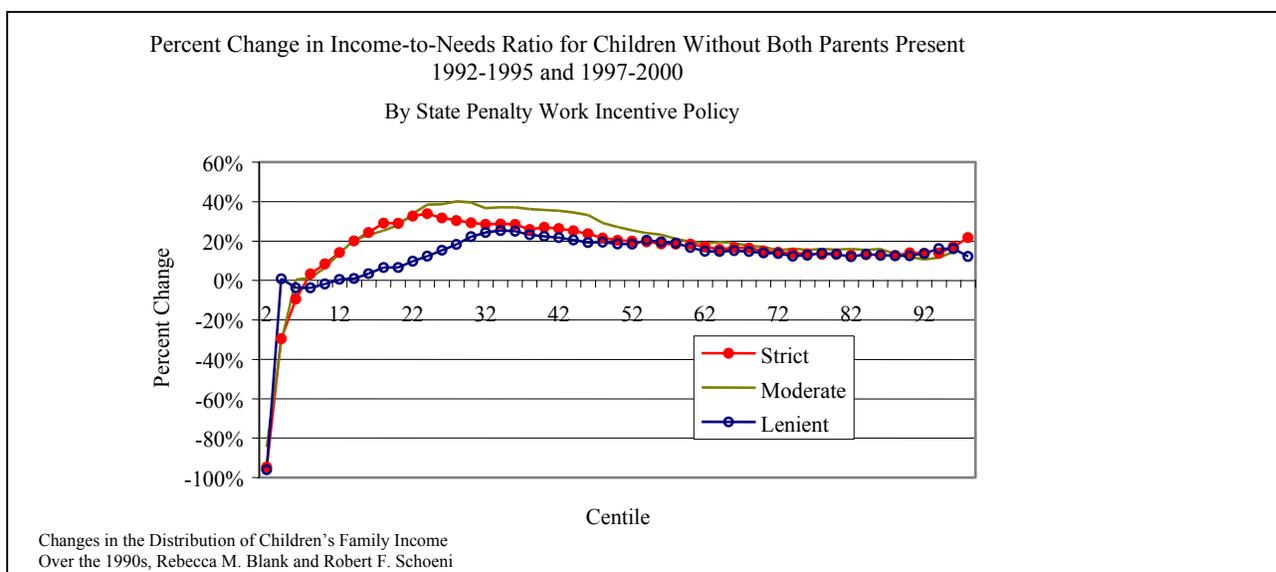
Tenet 2: Maximize Self-Sufficiency Through Work and Additional Constructive Activities

Require welfare agencies to engage all eligible families. Mr. Winstead stressed the importance of “universal engagement.” States will be required to engage all adult TANF cases in work or work preparation activities. States must establish self-sufficiency plans for every family, assure that all families are pursuing their plans through monitored and constructive activities, and regularly review the progress of each family.

Increase minimum participation rate requirements. In FY 2003, at least 50 percent of all TANF cases headed by a parent will be required to participate in combined work and other activities designed to help them achieve self-sufficiency. This percentage will increase by 5 percent per year until it reaches 70 percent in 2007.

Require full 40 hours per week participation by welfare recipients. Cases counted as participating will be required to average 40 hours per week in monitored

activities. Mr. Winstead illustrated this point with a graph that showed the direct relationship between stricter work requirements and more benefits for families. With research as evidenced by this graph especially for States with ‘strict and/or moderate’ work requirements, Mr. Winstead suggested that Federal welfare officials believe that the rigor of work requirements is an important contributing factor to caseload reduction.



Increase direct work requirement. Cases counted as participating also will be required to average at least 24 hours per week (of their total required 40) in work.

Give work credit to families engaged in short-term substance abuse treatment, rehabilitation, and work-related training. The proposal allows States to count certain activities as meeting the work requirement for limited periods of time. Individuals participating in substance abuse treatment, rehabilitative services designed to maximize self sufficiency through work, and work-related training enabling the recipient to work, can be deemed to have met the three days a week work requirement. This exception would be available for no more than three consecutive months within any 24-month period.

Improve participation rate calculation. Calculation methods will be improved to recognize practical challenges States face in keeping recipients involved and participating in the program. Mr. Winstead briefly elaborated on this point by mentioning that States will be able to obtain prorated credit for families engaged in appropriate activities less than full time if they meet their 24-hour direct work requirement. States will have the option of not counting cases for the purpose of determining participation rates for the first month after a case is opened.

Eliminate separate two-parent family rates. The separate work requirement for two-parent families will be eliminated.

Phase out the caseload reduction credit. The current credit that inadvertently undermines the TANF work requirement will be phased out as follows: States will receive full credit against participation targets in the first year, 50 percent of credit in second year, and no credit thereafter.

Conform requirements for teenage parents in school. Teen head-of-household parents who maintain satisfactory school attendance will be deemed as meeting all participation requirements, as in current law.

Provide technical assistance for Tribes. HHS will undertake a major new technical assistance effort for Tribal organizations to help them build and administer effective Tribal TANF programs.

Current waivers expire on their original expiration date. The few remaining State welfare waivers will continue until their original expiration date, at which time, the programs must conform to the program rules in this proposal.

Conform State penalty structure. Current law penalty structure will apply when a State fails to meet either or both of the universal engagement or full participation rate requirements. Potential penalties will still be limited to 5 percent of a State's TANF grant in any given fiscal year.

Retain 5-year time limit and 20 percent exemption. The Administration's proposal will retain current law provisions with respect to time limits. These provisions restrict families to 60 cumulative months of Federally-funded assistance (or less at State option). States may exempt up to 20 percent of their caseload from the time limit without penalty. These provisions make it clear that TANF assistance is temporary. At the same time, the policy recognizes that certain hardship cases require more time to achieve self-sufficiency.

Mr. Winstead stressed the point that Federal officials have not perceived substantial difficulties for families in terms of time limits. He emphasized that since time limits were implemented in 1996, only 8,000 families lost benefits due to remaining on the caseload past the 60-month time limit. On a national level, he did not perceive that time limits are unworkable or that the 20 percent exemption was an insufficient number.

Tenet 3: Promote Child Well-being and Healthy Marriages

Mr. Winstead introduced this tenet and its respective sub-sections as the one that has received the most media attention.

Establish overarching purpose of TANF to promote child well-being. "Improve the well-being of children" will be established as the overarching purpose of TANF.

Clarify encouragement of healthy marriages as a TANF goal. The TANF goal of encouraging the formation and maintenance of two-parent families will be revised to clarify that the goal is to promote healthy, two-parent, married families.

Support demonstrations, research, and technical assistance. The Illegitimacy Reduction Bonus will be discontinued and the savings of \$100 million will be used for broad research, evaluation, demonstration and technical assistance, focused primarily on healthy marriage and family formation activities.

Create a competitive matching grant program. \$100 million from the current-law High Performance Bonus will be used to establish a State matching grant program for innovative marriage and family formation activities.

Require States to describe efforts as part of their State plan. State plans must describe the efforts States make to accomplish the family formation goals of the TANF program, including the promotion of healthy marriages.

Encourage equitable treatment of two-parent married families by States. States will be required to describe in their State plans efforts to ensure equitable treatment for two-parent married families in State welfare programs.

Reauthorize the Abstinence Education program. Mr. Winstead enumerated three programs that would be included under this provision that totaled over \$135 million in funding. First, as stated, to reauthorize the abstinence education funding for \$50 million. Second, to increase community-based abstinence education grants from \$40 million to \$73 million. Third, to maintain funding of \$12 million for the Adolescent Family Life Program.

As he ended this section, Mr. Winstead emphasized that all provisions of this tenet are voluntary for families and voluntary for States. “If people want it, we think it makes sense to help them,” he stated, “But if the States say ‘No thank you,’ that’s fine also.”

Tenet 4: Improve Program Performance

Focus on employment achievements. \$100 million per year will be available for an Employment Achievement Bonus to reward States for meeting employment goals.

Address all TANF purposes. States will be required to describe in their State plan how they are addressing each of the purposes of TANF.

Set performance goals. States will be required to set performance goals for each of the purposes of TANF.

Measure and report performance. States will be required to measure and report on their annual performance relative to the goals they set.

Research and technical assistance. HHS will collaborate with States to improve management and performance.

Revise data reporting requirements. Data collection will concentrate on information that helps States improve management and performance, while facilitating Federal oversight.

Addressing areas of special attention. Each year, States will be required to document their efforts to address selected challenges of TANF program operation.

Tenet 5: Enhance Child Support Enforcement

Provide Federal matching funds for child support pass-through to current welfare recipients. Federal matching funds will be available to States to expand the pass-through of payments on past-due child support to families on welfare. Mr. Winstead stated this number would be \$136 million more for families for five years.

Provide Federal matching funds for child support pass-through to former welfare recipients. Federal matching funds will be available to States to expand the pass-through of payments on past-due child support to former TANF recipients. Mr. Winstead stated this number would be \$851 million more for families for five years.

Require regular support order reviews. States must review child support orders for TANF families every 3 years and, if necessary, make modifications to the order amount. This provision is intended to improve child support collection rates for TANF families.

Collect user fees from non-TANF families. States must collect a \$25 user fee from families receiving child support services that have never received TANF.

Lower passport denial threshold. The amount of past due child support needed to deny a passport will be reduced.

Withholding limited Social Security benefits. Social Security Disability Insurance payments will be withheld to pay past-due child support.

Tenet 6: Food Stamps for Legal Immigrants

Change of permanent ban on food stamps. Legal immigrants who enter the United States after 1996 will be eligible for food stamp benefits after they have legally resided in the country for five years.

Tenet 7: Facilitate Program Integration

Establish new State program integration waivers. New waiver authority will be established that permits States to integrate welfare and workforce assistance programs in order to improve the effectiveness of these programs.

Broad flexibility given to design new strategies and approaches. Waivers can apply to all aspects of selected Federal programs so that States can fully integrate welfare and workforce assistance systems.

Waivers granted on the basis of likelihood of success. Cabinet Secretaries of Federal Departments administering the effected programs must approve a State's request for a waiver if there is a likelihood that the proposed changes will increase program effectiveness.

Maintain accountability for program performance. States will be required to establish performance objectives and goals for reformed programs. Program modifications will be scientifically evaluated.

Require cost neutrality. Waiver programs must be cost-neutral across the involved programs.

Regular reports to Congress. Departments approving waivers must report annually to Congress on impacts and progress.

Mr. Winstead ended his comments with a few more reflections as an overview of the reauthorization process. He referred to the TANF reauthorization process with the metaphor of a Polaroid picture that takes a few minutes to develop. "Slowly the picture is emerging," he stated.

2.3 The Work Participation Rate

Mr. Bush completed the evening's presentation with guidance to the attending city-teams on how the Federal agencies will calculate the work participation rate under the Administration's proposal. Because there has been a considerable amount of misinformation about this critical calculation, Mr. Bush wanted to take time to explain details and answer questions. Mr. Bush split his discussion into two parts: self-sufficiency activities and minimum participation rates.

Beginning with self-sufficiency activities, Mr. Bush delved into the concept of universal engagement, which emphasizes that agencies should be challenged to work with every client they have and provide them with the greatest services possible. Specifically, Mr. Bush focused his discussion of self-sufficiency activities on two provisions: self-sufficiency plans and progress reviews.

Self-sufficiency plans for each TANF case will be created within 60 days of the date at which the case opened. On this point, Mr. Bush conceded that the Federal officials will give complete flexibility to the States on how to implement these self-sufficiency plans. Also, Mr. Bush noted that this provision would not apply to child-only cases. Aside from these initial plans, the agencies must also implement regular progress reviews. States will be given complete flexibility on how to operationalize these progress reviews.

On the concept of minimum participation rates, Mr. Bush stressed that although the President's reauthorization proposal is very flexible, these requirements are "the one thing that the Federal government asks in return." The main stipulation in calculating the participation rate requires an average of forty hours to be counted per week for each TANF client. This average will be calculated over one month's time. Technically, Mr. Bush explained, this number actually comes out to be 37.5 hours per week, which is a managerial accommodation because months are not a standardized length of time. However, Mr. Bush emphatically exposed the mythology that this 40 hour stipulation is *not a forty-hour work requirement*. Instead, the 40 hours is split into 24 hours of what are referred to as "direct work activities" and 16 hours of what are referred to as "any other helpful activities." The requirements and activities that fit within these 16 hours will be defined at the State level, as long as the activities fall within the broad purposes of TANF.

After outlining the overall framework of the participation rate, Mr. Bush provided suggestions about how States could creatively and flexibly work within the paradigm. Mr. Bush encouraged the audience to "think up activities for each case" and provided suggestions such as "substance abuse treatment, job training programs, drivers education, etc." He stated that this flexibility was a way for States to design programs around work. For hours to count toward the participation rate, Mr. Bush said that they must be *actively monitored* and *actively supervised* to determine if the TANF client actually attended the "other helpful activity." He also laid out a few target numbers, articulating that States must rise from 50 percent participating in the first year to 70 percent participating by year five. For cases to count toward the participation rate, they must meet the direct work and full participation requirements. In addition, cases that closed for employment purposes within the previous three months can also be counted toward the participation rate. Mr. Bush referred to this provision as "basically an employment credit." Furthermore, Mr. Bush elaborated the definition of "direct work activities" to include provisions such as "employment of any kind," "on the job training," "work-fare," or "community service" such as work with volunteer organizations. "Integrated or blending work with another activity," is another admissible provision that may count as a direct work activity, an area where Mr. Bush believes there is a lot of promise and flexibility. As stated earlier, all the provisions are admissible as long as they are supervised and the client's attendance is monitored.

To clarify some exceptions to these requirements for the Academy attendees, Mr. Bush discussed both new provisions and current provisions in the President's proposal. New provisions include:

States may choose to exempt families from being counted for the purposes of calculating the participation rate for the first month after the case is opened.

Direct work is not required for three of any 24 months. Hence, States now have the flexibility to have a client participate in a full-time job training program for up to three months and actually count that time in training as work.

States may obtain prorated credit for families engaged in appropriate activities less than full time, provided they meet the 24-hour direct work requirement.

Current provision retained in the proposal include:

States will retain the option to exclude parents with children under 12 months of age from being counted for the purposes of calculating the participation rates. States must, however, require such parents to participate at some level.

Teenage heads of cases that are in school and performing satisfactorily will satisfy both the 24- and 40-hour requirements. If school attendance is unsatisfactory, teenage parents will be required to meet work and full participation rates to be counted in the State's participation rate calculation.

The 24-hour work requirement is part of the 40-hour full participation requirement, and TANF payments to families participating in supervised work experience or supervised community service are not considered compensation for work performed.

Mr. Bush concluded with a few predictions and final points of emphasis. He conceded that some elements of the bill are more popular than others and expected that President Bush may have to compromise on certain elements of the proposal for it to pass. However, Mr. Bush expected the 50 to 70 percent five-year participation rate requirement for States to stay because he believed it is real and has enough support to remain in the bill. He also noted that the universal engagement concept is strong. Mr. Bush completed his section of the keynote address with the same emphasis that he stressed in his welcoming remarks just hours earlier: meeting these new requirements is going to require States to manage their caseloads effectively. States will have to manage well to achieve these ambitious results. Mr. Bush ultimately suggested that the most important challenge currently facing States on the eve of TANF reauthorization is one of management.

2.4 Questions and Answers

Q: Pertaining to the broad concept of “child well-being,” because the Children’s Bureau may define child well-being one way and the Office of Family Assistance may define it another way, will there be a consistent definition of child well-being through the Department of Health and Human Services?

Mr. Bush: The concept of child well-being is defined broadly in the law and is not intended as a regulatory mechanism. The only time that it would function as a regulatory piece is if you have an expenditure. The definition of child well-being will most likely stay as it is.

Q: Where does searching for a job as a full-time activity fit into the definition of “direct work activities” that you just described?

Mr. Winstead: Full-time job search fits into the definition in two areas. First, states have the ability to define or have broad flexibility to define up to three months of activities. Second, the optional first month can include job search. The Federal government is currently looking for a more specific place for the explicit activity of searching for a job.

Q: Is the stipulation of three months out of twenty-four for job training still a negotiable issue within Congress? For the unskilled or low-skilled clients remaining on the caseloads, I worry that three months of job training may not be enough to prepare someone for employment.

Mr. Bush: Yes, the job training allotment is very much still an open issue and is one of the more contentious issues in Congress at this point in time. Last year, the Senate proposed a longer amount of time, and the House proposed a one-month extension on the three month allotment.

Q: The energy and time spent tracking hours and participation rates could be spent in other ways such as focusing more on creating jobs. Why is the participation rate the current measurement of success, and why don’t you feel that job attainment might be a better measure?

Mr. Winstead: The consistent focus of Congress has been to engage TANF clients in productive activities. We are not yet at a point where we have the sufficient outcome measurements capable of relying on other measures. The main crux of the debate focuses on the right ratio of hours. The current direct work requirement is relatively a very modest one. If we were to move to a more full outcome-based system like you describe, that’s more for the reauthorization in FY 2009.

Q: I think TANF clients with a language barrier fall through the cracks of the three-month job training requirement. In the new proposal, how do you accommodate the Limited English Proficiency (LEP) population and how is that going to work for the States?

Mr. Bush: The new proposal is intended to accommodate populations that have a variety of problems while still retaining a core of work. Research consistently suggests a direct relationship between the effectiveness of a program and the centrality of work elements in that program. However, work needs to be blended creatively with other activities. Work requirements plus blended training and learning allowances are a good mix.

Q: At this discussion, I don't see the same Federal mix of agencies at the podium there that you require of us at the local level. As we attempt to leverage resources at the local level, are Federal agencies working together and forming collaborations as well?

Mr. Bush: The TANF program is a good engine to start working on interagency cooperation. The concept of the new "Superwaiver" can take proposals across several agencies like Food Stamps and Workforce Investment Act programs. The focus should not be to change the fundamental core of the program but to allow it to be implemented through interagency cooperation.

Q: The current weak economy is different than the economic prosperity we enjoyed when the initial Act became law. We're seeing mass lay-offs, and in this economic downturn, I worry that the people on the welfare roles are going to be the first people laid-off. It seems that skills and training are especially more important now than before. How do you feel that the difference in economic prosperity will influence the implementation of the new welfare reform?

Mr. Winstead: The change in economic times will make the task of reform more challenging and skills and training are important elements within reauthorization. However, numerous rigorous evaluations have consistently suggested that when training is part of a blended set of activities that includes a strong work component, the likelihood of client success is higher than training alone. The research shows that training alone does not necessarily lead people to higher paying jobs. It is clear that we need to blend activities, so people can move toward self-sufficiency and also find ways to increase training at the same time.

Q: Have you thought about economic triggers that might come into play for the urban areas that have the highest levels of unemployment? Also, in the concept of child well-being, why did the proposal choose child well-being over family poverty as the goal you were seeking to address?

Mr. Winstead: There are several aspects in the current law that do have some economic triggers attached to them. However, we still want clients to be challenged and engaged in productive activities. In a slower economy, the mix of work and other productive activities may vary, but engagement is the bottom line. People on welfare must be moving toward work, not just languishing and living in deep poverty. The goal of reducing poverty still remains in the House bill. However, it seems to be something that would better be developed in partnership

with State and local programs. The Federal partners will work with the States to reduce poverty but are not comfortable mandating it in the bill.

Q: In Georgia, we just had an audit with the Office of Civil Rights, and one of our greatest concerns is accommodating people with disabilities. What conversations have occurred at the Federal level regarding persons with disabilities? Also, even though caseloads are reducing, it is taking States more money to meet the needs of people on the caseloads. How can States find the funding to meet these clients needs?

Mr. Bush: Different levels of disability are eligible for different types of benefits. For people who are the most disabled, they're eligible for Social Security, and TANF can help with that as well. In regards to your question about funding programs, this is a broad and universal question for the States to think about. However, programs do not necessarily have to be funded with TANF dollars. Other diverted programs with other funding sources can also be used to free up funds and serve TANF clients.

Q: I have a brief question of clarification on defining direct work activities. Is the definition of work-fare tied to Fair Labor Standards Act standards? Also, if community service is a non-paid activity, how do we serve an individual who's in training for 16 hours and unpaid community service for 24 but is still meeting the work requirement without any earnings?

Mr. Bush: Here, the max-out rule might be relevant. Also, I believe that unpaid work experience is still subject regardless of the setting. Different States' benefits structures vary, so there is not one consistent answer.

Q: As the States have faced budget crises, we've seen reductions in Medicaid and eligibility for child care, but personally, I feel that we'll see some of those people come back on the caseloads. In the old days, when the economy is bad, job training is the key to rebuild the economy through labor. Do you anticipate more training dollars coming through the Department of Labor?

Mr. Winstead: Workforce Development is also up for reauthorization this year too, but your question is hard to answer before the President releases the budget for the proposed bill. The President's budget will likely include major new opportunities for increased State flexibility with Medicaid and child care. The emphasis of giving the States more ability to manage programs in a coordinated fashion is something that you will see in various areas of the President's budget when it is released.

To end the Question and Answer session, Mr. Grant Collins listed several items to frame the audience's thinking, including:

Universal engagement;

Work and other constructive activities;
Standards for monitoring and progress;
Individualized case management, and;
Work Support.

3. TEAM BUILDING SESSION

Following the keynote address, Ms. Karen Lynn-Dyson of Caliber Associates charged the city-teams to learn more about their sister-cities during the next team-building session. In the team-suites, the sister-city teams reflected on the topics raised in the Keynote Address and began to think through how TANF Reauthorization and the critical challenges of the next phase of welfare reform would be built into their action plans. This activity gave the city-teams an opportunity to meet, engage with, and begin building a partnership with their sister-cities. It also provided a venue for an informal dialogue during which the sister-cities could learn from each other and begin to lay the groundwork to collaborate in the future.

4. THE ACADEMY FRAMEWORK: PURPOSE, MISSION, AND FOCUS

Ms. Lois Bell, Division Director of State and Territory TANF Management, Office of Family Assistance

Mr. Andrew Bush, Director, Office of Family Assistance

Mr. Clarence Carter, Director, Office of Community Services

Mr. Don Winstead, Deputy Assistant Secretary for Human Services Policy, Office of the Assistant Secretary for Planning and Evaluation

Ms. Lois Bell began the second day of the Academy with her introductory remarks to outline the upcoming Academy morning session. As the Academy moved forward, she encouraged Academy participants to keep their “eyes on the prize” which she identified as the client families that TANF serves. She also introduced regionally-based Federal staff and other Federal personnel that were in attendance at the Academy to serve as resources and guides for the city-teams.

4.1 Developing a Strategy for Effective Service Delivery

Mr. Andrew Bush, Director, Office of Family Assistance

Mr. Bush provided an overview of the components of the Urban Partnership Initiative and its intended purpose. He encouraged everyone in the room to “roll up our sleeves” because this day’s purpose was to really start thinking about the nuts and bolts of management. Federal officials would give previews of what is going on at the Federal level, but ultimately, the cities needed to form strategic action plans to address how they can build good programs that serve families. Mr. Bush framed the discussion by asking: how can we build and manage a strong self-sufficiency program? He gave three suggestions to address this question:

Use a TANF-centric approach;

Start with the service needs of the families themselves, and;

Think through how to manage for full engagement.

Mr. Bush led the audience through a discussion of what he called the “case-agency nexus” during which he outlined the needs of a typical TANF case. He noted that needs change over time, the prioritization of needs also change over time, and hence, the portfolio of services will change over time as well. While securing job placement may be a pressing need at Day 20, career advancement may become a more critical need at Day 100. Mr. Bush described the focus of Day Two of the Academy to be “building the service networks that your clients need.” The focus of Day Three would be “constantly improving the quality of services you provide.”

4.2 Continuum of Service

Mr. Clarence Carter, Director, Office of Community Services

Mr. Clarence Carter, Director of the Office of Community Services (OCS), emphasized the relevance of government and community-based services in the context of welfare reform and provided a working definition of community services for the audience. He began his presentation with a brief anecdote to illustrate that it is still too soon to assess whether or not welfare reform was a success.

While he was the Commissioner of the Department of Social Services (DSS) for the Commonwealth of Virginia, he was asked by a reporter if the newly implemented Virginia Independence Program, Virginia’s State welfare reform policy, was a success *one week* after its inauguration. Mr. Carter remembered thinking, “That is the most ridiculous question that anybody has ever asked me.” He used this example to stress the point that with such a

significant shift in public policy, it may be ten to 20 years before we can really assess if it was a success. Now, seven years after the passage of PRWORA in 1996, although Mr. Carter agreed that we have had a wonderful start with welfare reform, he cautioned against jumping to conclusions.

Mr. Carter articulated that it is still too soon to proclaim welfare reform a complete success. He emphasized that even though we have had a good start, it is only a start. Just like the reporter in his story tried to assess success too early, it is still too early in Mr. Carter's mind. For him, we need to take this very good idea and ask how we can build on it so it can achieve its ultimate promise.

Mr. Carter then described his role as the Director of the Office of Community Services (OCS). He remembered how all 12 OCS programs were completely disconnected when he first took office. Mr. Carter asserted that if it was indeed our goal to build capacity and strengthen communities, shouldn't we make it as easy as possible? With this vision, he restructured OCS to provide a model for communities to take a more integrated approach to services. Mr. Carter strongly believed that an integrated model was important to knit together all the available government services to best empower individual communities to help themselves.

Mr. Carter next outlined a few new programs and services that will soon be released from the OCS such as a series of city-wide conferences that will focus on OCS tools and resources that can be utilized by cities to improve community health. He described how the OCS currently provides over \$100 million dollars through 12 aggregated programs that local-level organizations can use and harness. If a true continuum of service is to result, the approach to service delivery must be comprehensive and fully integrated.

A true continuum of services requires a comprehensive approach to service delivery and integration at all levels. To illustrate how these linkages are being formed at the Federal level, Mr. Carter detailed how he is working closely with Mr. Andrew Bush and the Office of Family Assistance (OFA) to create models of integration within the Federal government. They are creating an unprecedented Federal partnership through a common understanding that they have to join together to create this continuum of service.

Mr. Carter ended his portion of the morning session with another anecdote about the Wizard of Oz. He retold the main parts of the time-honored story and emphasized the ending message that the Wizard imparts to Dorothy and the travelers: "Whatever you ask from me, you had it within you all along. All you have to do is summon it." After using this story, Mr. Carter stressed that he does not want to suggest that all the cities' problems could be solved by "clicking our heels and wishing." However, he did want to use this story to illustrate the point

that the answers to our problems reside in the collective wisdom that we already have together within our communities.

4.3 The Power of Information

Mr. Don Winstead, Deputy Assistant Secretary for Human Services Policy, Office of the Assistant Secretary for Planning and Evaluation

Presenting on “The Power of Information,” Mr. Don Winstead stressed the importance of using recent data to inform and improve welfare policy and practice. To elaborate, Mr. Winstead made several points regarding data and research. In his first point, which he phrased as “moving from data to information,” Mr. Winstead suggested that not very long ago, Federal researchers did not have a lot of data to inform them about what was happening with the implementation of different policies. Today, the problem is not a lack of data, but rather that Federal researchers are being bombarded with so much data that it is hard to integrate it all and see what it means.

Secondly, although much data is collected using sampling methods, Federal officials are trying to draw a more comprehensive picture of the welfare caseload with their TANF data. One of the main detriments of a using a sampling approach is that it precludes the ability to capture longitudinal information. In other words, sampling may lead to a distorted picture of what is really going on.

Stressing that “there’s no such thing as aggregate performance,” Mr. Winstead stated that all TANF data really boils down to one case manager and one family. “Everything else is just math,” he said. Therefore, regardless of whom is analyzing the data, whether it is a local, State, or Federal worker, that data should all be the same information. Data from all different programs such as food stamps, child care, or job assistance all need to be integrated better to help complete the picture of what is going on with each case, even when complicated by different reporting cycles, such as with different Census surveys, and different reporting methods.

Lastly, Mr. Winstead mentioned the power of linkages. After showing an example chart with Florida case data as recent as two weeks before the Academy, Mr. Winstead suggested that the possibility exists for researchers to access more up-to-date case data. The Internet provides a great medium for this data exchange to occur. It allows for data to be transparent and almost readily available in real-time. These new technological advances should improve researchers’ abilities to analyze data more quickly, efficiently, and effectively. They can compile data from a variety of sources and start to look at it in a variety of ways.

Turning to a future-oriented focus, Mr. Winstead noted two new relevant Federal projects. The Office of the Assistant Secretary for Planning and Evaluation (ASPE), in

conjunction with the Administration for Children and Families (ACF), has begun two projects that address improved use of TANF administrative data. One project deals with aggregate TANF data and enhancements to the current ACF Web-reporting system; the second project concerns disaggregated, micro-level TANF data and the development of a new software tool for use by States in analyzing data for program management and performance measurement. While the two projects are independent of each other, they share the common goal of improving the use of existing TANF administrative data.

5. CITY PROFILES AND PROMISING PRACTICES

For this session of the Academy, representatives from each city-team were given an opportunity to make a presentation regarding the administrative structure of their welfare program and the highlighted promising practices that they are administering. The following summarizes these presentations.

5.1 Atlanta

The city of Atlanta, GA currently reports a total population of 416,474, placing it as the 40th largest city in the country. Georgia's TANF program is administered at the State level in the Department of Human Resources (DHR). Notably, Georgia places a four-year lifetime limit on cash assistance. With regard to caseload trends, in June of 2002, Georgia's TANF caseload totaled 53,152 families, a decline of 1.3 percent from December 2001.

One strength of the Atlanta TANF program is its strong history of collaboration with various agency partners. However, the Atlanta city-team articulated their desire to establish more fully coordinated services for TANF families in their city. To this end, Atlanta's goals and objectives for the Academy were to facilitate communication with organizations serving clients with multiple barriers, to build capacity for improved service delivery, and to learn successful integrated program models.

During Atlanta's city-team presentation, the Fulton County Human Services Department Office of Workforce Development (OWD) highlighted their GoodWORKS! Project as a promising practice. GoodWORKS! is an initiative designed "to assist long term TANF recipients with a personalized assistance plan for resolving the existing barriers to employment, securing gainful employment, and becoming economically self sufficient using a holistic approach." GoodWORKS! supports program participants in the following four ways:

Recruitment. At the intake stage, potential GoodWORKS! participants receive a home visit designed to explain the program and obtain a signed participation commitment from the customer. The Recruiter will also provide assistance to remove

any immediate barriers that will prevent the potential customer from attending orientation.

Personal Advisement. A Personal Advisor assists the customer with eliminating barriers to employment, and develops an Individualized Service Plan with the customer that meets their employment objectives. The Personal Advisor is available to the customer at all times.

Activities. Customers in the GoodWORKS! program participate in either Work Evaluation or Work Adjustment activities:

- *Work Evaluation* provides a detailed assessment of each customer’s work skills. All customers are required to participate in Work Evaluation for a minimum of thirty –five hours per week for one to four weeks. Twenty-five hours of Work Evaluation are counted as paid work activity. The remaining ten hours are performed in a classroom setting.
- *Work Adjustment* is a hands-on work experience activity in a supervised work environment. Customers participate for a minimum of thirty-five hours weekly in a supported work environment while earning an hourly wage. Customers build work-related skills in a supported work environment, and have access to Job Coaches if they need additional support. Customers can participate in Work Adjustment programs for up to nine months.

Retention Services. Designed to support GoodWORKS! customers engaged in work, retention services include workshops, incentives, and other supportive services. There is also a quick intervention service available for customers who lose their jobs.

- *Supportive services* include child care, Medicaid, transportation assistance, and Medicaid.
- The *Incentive* structure is based on time engaged in work, with each three months engaged in work increasing gift card value by \$50.

5.2 Baltimore

Baltimore, MD has a total population of 651,154 and ranks as the 17th largest city in the country. In the State of Maryland, TANF is administered at the State level in the Department of Human Resources (DHR), and the welfare program is titled Temporary Cash Assistance or TCA. Since August of 1996, the State of Maryland has witnessed a dramatic decline in TANF caseloads. In June of 2002, the TANF caseload stood at 25,983, a 63 percent decline from six years ago.

Primary strengths of the Baltimore TANF program include extensive collaboration as well as being Federally-designated as an Empowerment Zone and a Renewal Community. However, the Baltimore TANF program is challenged by a lack of programs to serve the needs of a changing caseload, including child-only cases, extended child care and after-school programs, and programs for children with special needs. Through their participation in the Academy, the Baltimore city-team hoped to learn information on best practices and other promising program models as well as develop coherent strategies that address policy and funding solutions.

Baltimore highlighted the development of Interdisciplinary Teams for case management as their promising practice. Under this model, integrated teams of specialists provide a comprehensive service delivery system to the customers. The interdisciplinary method of case management allows flexibility and ingenuity in overcoming obstacles to employment. In order to maximize the effectiveness of this case management model, a Career Development Unit was created consisting of the following new positions:

- Job Developer;
- Workshop Coordinator;
- Workshop Training Assistant, and;
- Career Development Specialist.

Additionally, five Work Groups were created to strategize and plan ways to increase performance, and an in-house marketing team was created to develop strategies to increase the visibility of the project.

To illustrate the model, Baltimore highlighted the Mount Clare pilot project, reporting that from April 2001 to June 2002, Mount Clare's in-house program placed 502 Temporary Cash Assistance (TCA) customers into jobs with an average caseload of 1,136. During the same time period, other Baltimore City Department of Social Services (BCDSS) FI Centers placed customers into jobs at a much lower rate. Of the total number of Mount Clare customers placed in jobs during the same period, welfare to work contractors only placed 35 percent at an average cost of \$5,000 per placement.

Specific outcomes of the new case management model articulated by the city of Baltimore included:

- Customers are immediately engaged and focused on work;

Job ready TCA applicants are able to find employment within three weeks of the date of application;

Mount Clare job placement rate consistently exceeds rate of other FI Centers;

TCA recipients are more likely to succeed in training/work if sent to New Beginnings since they have three weeks to decide what employment opportunities to pursue within the expectations of welfare reform;

Customers are more prepared for next steps since the team of case managers is able to identify and address barriers and deal with time/attendance issues during the three weeks;

Customer show rate for appointments with vendors in Mount Clare consistently exceeds rate of other FI Centers, and;

Customer's TCA recidivism rate for those that remain closed for thirty days in Mount Clare is consistently under 25 percent.

5.3 Detroit

The population of Detroit, MI currently stands at 951,270, the 10th largest city population in the country. Michigan's TANF program is the Family Independence Program (FIP) and is administered by the Family Independence Agency (FIA) through a network of county offices. Work First and other welfare reform programs are administered by Michigan Works! agencies throughout the State. In the six months between December 2001 and June 2002, Detroit's TANF caseload declined nearly 7 percent from over 76,000 to 71,591.

Detroit is a Federally-designated Empowerment Zone. The city's TANF program's primary strengths include being strong advocates for child care services, forming a collaborative task force with service resources to support TANF clients' transportation difficulties, and almost ten years of experience coordinating TANF services between TANF and workforce development agencies. The Detroit city-team described various challenges they are facing such as a reduced demand for entry-level employees among local employers and the transportation issues that result from a large spatial divide between where most TANF recipients live and where most jobs are available. Detroit's goals and objectives for the Academy included learning about best practices from other cities that promote employment, job retention, skill development, and career advancement.

The Detroit city-team listed their monthly meetings with all Work First programs as the city's promising practice. The City of Detroit holds monthly meetings for all 45 of their contractors. At these meetings, Employment and Training (E&T) Work First Coordinator reviews all new or modified E&T and State policies, highlights and honors high performance

among the contractors, and encourages uniform and continuous service quality improvement. To encourage all contractors to be knowledgeable about the latest E&T and State policy changes, Ms. Watson uses a random method of calling on people to answer policy questions. The supportive but competitive meeting environment encourages everyone to be well-versed in E&T and State policies.

At each meeting, high-performing contractors are recognized and given certificates. Excelling contractors from each of the three groups (large, medium, and small caseloads) are recognized. Contractors that have been recognized for high achievement provide presentations on why they have been successful. Several positive outcomes have been associated with the beginning of these meetings:

Improve communication between E&T and its contractors;

Ensure that all agencies have, and understand, E&T and State policies;

Encourage high quality and uniform service quality, and;

Increase overall job placement and retention performance (currently by 10%).

5.4 Grand Prairie

Grand Prairie is actually the tri-city area comprised of Dallas, Ft. Worth, and Arlington, TX with a combined total population of 2,056, 243. In Texas, TANF is operated at the State level in the Department of Human Services (DHS) and has a three-tiered time-limit based on education and work experience. As compared to the December 2001 count, the Texas TANF caseload stood at 134,078 in June 2002, a decline of 3.8 percent.

The Grand Prairie team identified their strong relationships with faith and community-based contractors as a primary city strength. In addition, the city is a Rockefeller Foundation pilot site for workforce development and capacity-building. However, the city-team listed their recent increase in the number of special-needs cases as the primary challenge that they currently face. This service barrier includes a 145 percent recent increase in applications for Medicaid. The Grand Prairie city-team came to the Academy with the goals of identifying best practices for networking with local agencies, identifying different funding sources, and identifying various new screening tools.

Grand Prairie described their “Business Access” program as a spotlighted best practice from their city. To address previous gaps in service for their client population of disabled individuals, Business Access is designed to serve adult TANF clients who have a disability themselves or are caring for a child with a disability but are still trying to keep up with

employment requirements. This program places computers in the homes of employed TANF recipients to improve their computer skills and to provide them with the access to job training and educational opportunities that on-line networking offers. In certain specific cases, Business Access affords TANF clients the added flexibility of working from home as well.

This program seeks to “create a village of services” for TANF customers living with a disability by empowering them in their homes. It can reduce and potentially eliminate the need for day care as well as prevent employees from missing excessive time at work due to their disabilities. As a more long-term goal, Business Access hopes to help the children of TANF clients to become more computer literate and break cycles of poverty through education. The innovative program has won awards for its impact.

To fill gaps in service to disabled TANF clients, Grand Prairie also described their screening tool for disability assessment as another best practice. Three noteworthy aspects of this tool include its adaptive computer equipment to accommodate disabilities, its non-threatening quality, and its features of allowing clients to self-assess their levels of disability.

5.5 Miami

Miami, FL currently ranks as the 48th largest city in the United States with a total population of 362,470. In Florida, TANF is administered at the State level and is entitled WAGES. Receipt of cash assistance through WAGES is limited to 24 of any 60 months and 36 of any 72 months in the State of Florida. Forty-eight months is the maximum lifetime endpoint for WAGES assistance. In June 2002, Florida’s WAGES caseload totaled 57,514 families, a decline of nearly 6 percent as compared to caseload totals of December 2001.

Miami’s primary city strengths include leadership at the mayoral level, the strong involvement of community leaders and organizations, and long-term collaborations they have in place. Most of the challenges that they mentioned surround employment. Welfare service agencies in Miami must cope with increasing levels of unemployment, stiff competition for jobs that were formerly available to TANF clients, a general lack of available jobs, and a lack of work supports. The city-team came to the Academy with the objectives of learning new strategies for employment stability and identifying alternative funding sources for services.

Miami is currently experiencing an increase in TANF customers who previously had been able to leave for employment but are now cycling back onto TANF because of job layoffs and the struggling State’s economy.

The Miami team representative described the city’s 23 one-stop career centers as their highlighted promising practices because of the centers’ capacity to respond to these pressing

employment problems. These one-stop centers integrate workforce and welfare transition programs into a single-delivery system as they provide an innovative and comprehensive array of employment-related services to TANF customers in the Miami area. Services provided include:

Relocation Assistance—to assist TANF customers that secure employment in another county or another State;

Hardship extensions—to provide for TANF customers who are not able to work for a variety of reasons;

Subsidized child care—to help working parents pay for quality child care as they work a part-time or full-time job;

New Electronic Classrooms—for customers to utilize on-line and other computerized job training programs, and;

A “Pocket-pal” coupon book—with a variety of helpful coupons to lower daily living costs.

Unfortunately, the Miami team anticipates that certain service centers may be forced to close because of the State’s poor economy. The city-team will closely monitor and manage these one-stops and do all they can to maximize services provided under increasing budget constraints.

5.6 Minneapolis

With a total population of 382,618, Minneapolis, MN is the 46th largest city in the United States. In Minnesota, the TANF program is administered at the State level and is called the Minnesota Family Investment Program (MFIP). Although many other cities at the Academy reported a recent decrease in caseloads between December 2001 and June 2002, Minnesota described a recent 3.2 percent caseload increase over this period of time. In June 2002, the MFIP caseload stood at 36,244 families.

Primary strengths of the Minneapolis TANF program include a strong history of successful collaboration and the development of Tier II and Tier III programs for the hard-to-serve population. Minneapolis has also been Federally-designated as an Empowerment Zone and is currently offering IRIS and CHOICES, two initiatives designed to support employment for MFIP clients with mental health barriers. Challenges for the Minneapolis city-team include cuts in Medicaid and child care, a recent influx of immigrants for whom there are relatively few culturally-appropriate services, and a difficulty in accessing Social Security services for TANF customers. The Minneapolis city-team came to the Academy with the goals of obtaining new best practice models for hard-to-serve clients and gathering information on connecting mental health patients to vocational needs assessment opportunities.

Minneapolis highlighted the Hennepin County Family Home Visiting program as a promising practice. This program is collaboration between the Hennepin County Community Health Department, the Minneapolis Department of Health and Family Support (MDHFS), and the Minnesota Visiting Nursing Agency. The goal is to provide home visiting services to low income families with a minor child or pregnant women. Persons eligible for services are at or below 200 percent of poverty or are eligible to receive TANF.

One aspect of the overall program is the Pregnant and Parenting Teens (PPT) initiative, which provides services to pregnant and parenting teens with an infant up to one month old, or to teens who are regularly absent from school because of their baby's health problems are given priority for services. Visits occur at school and home settings, where professional home visitation nurses assess barriers to teens' completion to school and provide services such as:

Assessing health;

Teaching and counseling to pregnant and parenting teens on health issues, and;

Coordinating community services to help teens stay in school.

Minneapolis has been able to measure outcomes for this project. In 2002, a study was conducted to determine the effectiveness of the home visiting efforts to date. A random sample of 523 charts were selected out of a total of 949 cases. Professional Home Nurses (PHNs) collected information from the charts, excluding their own clients. Women participating in the program were more likely to enroll/reenroll in and finish school, avoid repeat pregnancies, and experience significantly better health and economic outcomes for themselves and their children.

5.7 Oakland

The total population of Oakland, CA is 399,484, placing it as the 42nd largest city in the country. In the State of California, TANF operates as CalWORKs and is administered at the county level. Compared to December 2001 tallies, California's CalWORKs recipients only marginally declined to a State-wide caseload of 462,179 families in June 2002.

The Oakland city-team listed their investment in the capacity-building of neighborhood collaboratives as a primary strength. In addition, they also have promising services available for LEP clients. However, the Oakland team described the generalized lack of affordable housing in the Bay Area as a main barrier that they face in providing services to TANF recipients. Specifically, the average cost of housing in the immediate vicinity nears four times the earnings of the average worker. The Oakland team is also challenged by clients with multiple barriers and the need for child care subsidies. Oakland's objectives for the Academy included a desire to

identify best practices related to sectoral employment and to broaden their conceptual understanding of economic self-sufficiency.

The Oakland city-team described The CIRCLE Project as a promising practice which was made possible through an OCS grant. The Oakland Neighborhood CIRCLES program provides comprehensive, integrated resources for CalWORKs Limited English Speakers. This neighborhood-based program partners with four community-based organizations to provide services in Vietnamese, Cambodian, Spanish, Laotian, Mien, Mandarin, and Cantonese-speaking clients. The program includes both co-location and one-stop affiliations to offer comprehensive workforce services. It also subsidizes transitional work for TANF clients in-between jobs or who move frequently from job to job. English as a Second Language (ESL) classes are provided on-site. In addition, the CIRCLES program focuses on career path development for Limited English Proficiency (LEP) clients through different means such as job creation activity, community classes, and one-stop Individual Training Account (ITA) training.

Although it is currently in its very nascent stages of planning, the Oakland team also mentioned the Family Independence Initiative (FII) as another noteworthy promising practice. Operating under the theory of change that community affiliation is essential, this program largely focuses on the identification and utilization of community resources for TANF clients. Ideologically, the up and coming program believes that vibrant communities form successful paths to employment for their citizens and micro-economies of scale. The program provides cash awards to TANF clients, monetary rewards for job progress, and asset development through Individual Development Accounts and up to three thousand additional dollars. Lastly, the program is currently working to obtain a waiver to make sure that cash awards to TANF customers are not counted as income.

5.8 Omaha

Omaha, NE is the 45th largest city in the country with a total population of 390,007. In Nebraska, TANF is administered at the State level under the name Employment First. Employment First most often terminates services to customers at the end of 24 months, allowing exceptions only for certain circumstances. In June 2002, Nebraska's TANF caseload stood at 11,468 families, an increase of nearly 4 percent from the December 2001 caseload.

Omaha reports their history of diverse collaboration as a primary strength. Moreover, it has been Federally-designated as a Federal Enterprise Community. Yet, cuts in child care subsidies have led to an increase in TANF caseloads in Nebraska. As a result, Omaha primarily faces the challenges of an increasing caseload and is also confronted by a growing number of TANF recipients being terminated from Medicaid. Omaha looked to learn many things from the

Academy including how to engage diversity, how to measure the success of best practices, and how to develop strategies for supporting the broader goal of self-sufficiency.

The Omaha team highlighted their “Keys to Life Academy” as a promising practice for serving clients in their Employment First program. Keys to Life is an educational and job readiness program that addresses the multiple barriers of Omaha’s “hard-to-serve” TANF population. It is a two-generation intervention designed to help participants transition from dependency to achieving a level of independence while maintaining their families as they enter the workforce. The program offers a “whole-family” approach; it combines job preparation and adult employment training services for TANF parents with social supports to help their children grow up healthy and ready to learn. Participants perform self-assessments, learn about child development, and develop parenting skills to increase the well being of their families. Conceptually, the program seeks to concurrently help parents move from welfare to work while still emphasizing the social and academic development of TANF children. Keys to Life operates in six key areas:

- Assessment of child and family need;
- Quality child care and early childhood education (i.e. Head Start);
- Services that strengthen parenting;
- Preventative health services for children and parents;
- Self-sufficiency services leading to employment and a living wage, and;
- Case management that supports the dual goal of economic self-sufficiency and healthy child development.

5.9 Seattle

Seattle, WA has a total population of 563,374 and is the 24th largest city in the United States. Washington’s TANF program is entitled WorkFirst. It is administered at the State-level and operates on a 60-month lifetime limit for the receipt of cash assistance. In June 2002, 52,634 families comprised Washington’s WorkFirst caseload, representing nearly a 6 percent decline as compared to caseload tallies in December 2001.

The Seattle team articulated their strong belief in the necessity of building collaborations to improve services to TANF families. They also described their involvement with foundations as a primary strength. Furthermore, the “No Wrong Door” program in Seattle integrates the case coordination of TANF clients who seek access to State services. However, Seattle service providers face high levels of unemployment, a multiple barrier population, and a large spatial

disconnect between homes and jobs as main barriers to servicing TANF families. Seattle came to the Academy to network with other cities and agencies, to learn local innovative strategies from other cities, and to learn about best practices relevant to working with a State-structured program.

Seattle described the W-PLEX program as a promising practice from their city. W-PLEX is the State of Washington's Employment Security Department's post-employment program for former TANF recipients. This program provides services to make it easier for WorkFirst customers to receive to post-employment services. Since 1998, W-PLEX has worked with over 40,000 TANF customers. As part of these services, trained employment counselors offer advice and guidance to TANF clients. Job counselors also work to find access for customers to stay employed and provide continued job training services as well. The program includes a job retention and wage progression feature, resume-writing guidance, and direct referrals to community resources and support services. Lastly, W-PLEX promotes use of the Earned Income Tax Credit (EITC) to obtain greater annual refunds for TANF clients.

5.10 St. Louis

As the 50th largest city in the country, St. Louis, MO has 348,189 total residents. The TANF program in Missouri is administered at the State level and is called Temporary Assistance. The State currently is working with a caseload of 47,289 TANF families, as recently counted in June 2002. This number represents a decline of nearly 4 percent from the previous count in December 2001.

St. Louis described how many of their systems are natural collaborative partners. They also listed their several points of access to services as a primary strength of their city. Unfortunately, the State of Missouri has experienced a severe and long-term fiscal crisis which has significantly impacted the available resources of the TANF program to serve families. Other than the economy, the St. Louis team discussed their fragmented, duplicative, and uncoordinated service delivery system as a primary challenge that they face. They came to the Academy to learn about innovative practices from other cities, to learn how to develop better linkages with workforce development, and to improve their conceptual understanding of "seamless" or "umbrella" services.

Two representatives from the St. Louis City Office within the Missouri Division of Family Services presented the team's identified promising practices. First, the Missouri team described their Area Resources for Community and Human Services (ARCHS) program. ARCHS is one of 21 caring partnerships between local and State agencies within the State of Missouri. More specifically, it is a formal collaboration of seven human service agencies. The

program seeks to represent the local voice in policy and programming on the State level. ARCHS provides no direct services; instead, through collaboration and partnership, they offer money, resources, and technical assistance to direct service providers. Although ARCHS itself is a promising practice, its purpose is actually intended to build other promising practices through partnerships with the business community, local government, educators, and other community based organizations. Through the framework that ARCHS creates, all partners come together on what are referred to as “local governance committees” or “neighborhood leadership teams” to collectively determine a plan for each specific neighborhood within the community. Different collaborations built through ARCHS include partnerships with over 300 community agencies, 62 schools, 13 business committees, and over 1000 community residents.

St. Louis also highlighted the Grace Hill Settlement House and its Member Organized Resource Exchange (MORE) model as an additional best practice of their city. Grace Hill offers a full range of services through a “neighbors helping neighbors” philosophy. They provide a variety of programs such as elder care services and support, health care, Head Start, and youth programs. In operation for over 100 years, the mission of this organization is to provide direct, cost-effective services within in the self-help traditions of the settlement house movement, to work for social change within society to foster greater support and understanding of the disadvantaged, and to work in disadvantaged neighborhoods creating strong, healthy, and helping communities by encouraging and supporting neighbors to help themselves and others.

MORE is Grace Hill’s basic mode of service delivery. It allows neighbors to trade their time and work for goods and services that would otherwise be solicited or donated. The MORE system is a cost-effective and dignified way in which neighbors develop self-confidence and self-sufficiency; Grace Hill simply provides the linkage network for neighbors to tap into resources from the agency and from each other.

However, Grace Hill also provides many direct services based on needs and resources as well, including services relating to family and child resources, Head Start, Employment/economic development, homelessness, and health. Additionally, Grace Hill has career centers, a Women’s Business Center, a Children’s Developmental Health center, two licensed day care centers, seven Head Start sites, four neighborhood centers, six neighborhood health centers, the Americorps program, and a homeless shelter. To address health-related needs, Grace Hill has established a Mobile Dental Team and a Health To-Go Van. Overall, this service model provides a comprehensive and holistic array of services for TANF families and the disadvantaged community.

6. ACADEMY LUNCHEON: AMERICA'S FAMILY

Mr. Steve Bigari, President and CEO, America's Family

Ms. Ovetta Sampson, Public Relations Manager, America's Family

Mr. Steve Bigari and Ms. Ovetta Sampson, both from America's Family, presented a model for engaging the public, private, and nonprofit sectors in achieving client self-sufficiency. Their presentation started with a brief movie that described their company and the purpose of McFamily, a McDonald's affiliated business program offering life services for employees. Ms. Sampson led the opening of this upbeat presentation by describing their company and introducing Mr. Bigari. She explained the "revolutionary partnership model" that America's Family has created which involves the public sector, McDonald's, and nonprofit sectors all working together to meet TANF clients' needs.

6.1 Program Description

Mr. Steve Bigari, the owner of 11 McDonald's franchises, gave the bulk of the presentation about America's Family. First, he started off with a point about the necessity of forming partnerships, and he also detailed the process of what he called "the poverty spiral." Turning specifically to his experience as a fast-food employer, he elaborated how employer turnover used to be a difficult barrier for him in the past. He used to go through a thousand people a year just to staff his restaurants because turnover was so high. Employees would remain stuck in a cycle of switching employment from McDonald's, to Wendy's, to Burger King in the hopes of making progressively more money at each new establishment. Unfortunately, no wage progression occurred as employees' wages remained at \$6.50/hr. at each new place along the cycle.

Mr. Bigari then made efforts to reduce this turnover, break the cycle, and retain more of his employees by providing more life benefits. First, in a partnership with community health centers, he leveraged resources to provide health care for his employees. In the early stages of the partnership, the financial burden of health care coverage was initially borne by the nonprofit and public sectors, but as time went by and as employee productivity increased over three years, this burden shifted to the employer and ultimately, the employees themselves. With a successful partnership like this one, Mr. Bigari began to realize an embedded positive incentive structure for everyone involved and began to explore further avenues to build other similar collaborations. These employer-driven partnerships formed the ideological basis for what would later become Mr. Bigari's brainchild, America's Family.

For Mr. Bigari, America's Family exemplified a business model in which employers provide life benefits to their employees. Currently operating in Colorado and Texas, it educates employees, engages employers, maximizes the resources of nonprofits, enhances community partnerships, and improves the efficacy of all three sectors involved. Within America's Family, these life benefits fall in six categories:

Communication—Providing employees with computer, Internet, and e-mail technologies;

Health Care—“Access is the key to utilization”;

Child Care—Safe, affordable, and of high quality;

Housing—A permanent place to call home;

Transportation—A car or access to public transportation, so employees can go where they need to go, and;

Education—Ranging from remedial levels to higher degree-seeking.

According to Mr. Bigari, these six areas account for about 50 percent of the reasons why people cannot work. Therefore, Mr. Bigari stressed that it is in the employers' self-interest to help the interests of the employees. It is not that the employees lack the heart to work; it is that they need someone or some organization to stand in the gap for them to help them succeed. For Mr. Bigari, there are numerous unique elements to America's Family:

Everybody involved is engaged by their own self-interest;

This is an employer-based solution;

Nonprofit missions are supported;

Government programs become more utilized and effective;

It is a natural, free-market model for expansion because it scales itself, and;

Community integration is stimulated.

Mr. Bigari praised the program as providing an opportunity for systemic change. It is based on what he described as an “impact-identity model” within which the program creates a belief, the belief creates identity change, with identity change comes image benefits, and with image benefits, everyone wants to get involved in such a successful model. The program also contains embedded incentives for various community agencies to form partnerships while serving TANF clients.

Another key unique element to America's Family is that the employer holds what Mr. Bigari referred to as "the bag of benefits." Generally, America's Family supports their employees in accessing privately-held resources (e.g. automobiles, rental housing) after they have been with the company for a certain period of time (e.g. three months). Individual clients can leverage the power and influence of an established institution like McDonald's to overcome barriers. For example, while an apartment landlord might be hesitant to trust and rent to a low-income individual, they are very comfortable renting to a new tenant whose rent payments are guaranteed by a company like McDonalds.

The program can boast powerful results. Referring back to his original problem of staff turnover, Mr. Bigari stated that while it used to take him 945 employees to staff 350 positions a few years ago, last year, it took him 455 employees to staff 400 positions. His employee retention rate skyrocketed after implementing the business model of America's Family. Plus, other large corporations such as Wal-Mart and Holiday Inn are considering adopting a similar model. Mr. Bigari referred to these corporations as "the 800-pound gorilla that can lay the track for the TANF client on their road to self-sufficiency." His business model teaches TANF clients to springboard off the system to create opportunities for themselves. Lastly, Mr. Bigari mentioned that replication of the business model is easy because it uses what Mr. Bigari called "the rocket fuel of the free market." He offered the encouraging message that any company could adopt this model because it is easy to replicate.

Mr. Bigari ended with a few closing remarks. First, he bluntly stated to the Academy participants that "if you don't harness the power of the private sector, your work will never be fully efficient." He concluded with the motivational metaphor that "together, we can turn this spark into a bonfire. All we have to do is use the rocket fuel of the private sector." He then opened the floor up for questions.

6.2 Questions and Answers

Q: Do you screen your potential employees?

Mr. Bigari: No, the program does not screen employees at all. Individual employers can decide if they want to screen, but America's Family does not. Previous knowledge of which employers screen allows the program to divert employees to the appropriate employers if screening will be an issue.

Q: In your program, do you hire people with either a substance abuse or criminal history?

Mr. Bigari: Yes, the program hires TANF clients with either substance abuse or criminal histories by tapping into an already existing substance abuse program. The business

model allows for these inclusive practices because it puts the weight of an established corporation behind the reputation of an individual employee. Instead of an individual TANF client applying for housing on his or her own, for example, the client now has the trustworthy influence of a respected corporation to boost their credibility.

Q: How do dollars flow in the program? For example, what are the program costs and who is paying for those costs?

Mr. Bigari: The program uses funds from multiple sources. For example, regarding health care, if a child's sickness prevents an employee from coming to work, America's Family deals with the problem as a child care issue. At that point, the child can be enrolled in CHIP, or that client can get leveraged into a community health center with which the program has an established partnership. The program levers every available asset and insists on self-sufficiency.

Q: How is the program marketed to some of the other businesses besides McDonald's, and why those particular businesses?

Mr. Bigari: The program is marketed to other businesses that are leaders in the corporate world that have multiple successful and established franchises. These business have the most persuasive power and influence. Moreover, other businesses are surprised that America's Family teaches and shares its business model with others for free.

Q: How do you get around the issue of waiting lists?

Mr. Bigari: A unique characteristic of America's Family is that it is not limited by public and nonprofit forces such as waiting lists. This program taps into the private sector as well. Although public housing may have a long waiting list, America's Family can tap into a private sector apartment complex that has available units. In this regard, the apartment complex can either lease to an individual that they know nothing about, or they can lease to an individual who has the influence and assurance of a trusted corporation vouching for their reliability.

Q: What advice do you have to help the cities partner with the private sector more effectively? How can we persuade private employers to put their faith in TANF clients like America's Family does?

Mr. Bigari: America's Family seeks to provide a model for private-public partnerships to spend funds more efficiently. However, to appeal to private employers and secure their cooperation, public agencies have to do a better job of framing their proposals in the private employer's best interest. Public agencies must learn about the private employers with whom they seek to partner and then phrase their proposals in terms that the private agency will respond to. With such appeals, these partnerships can occur in any city.

Q: Regarding your car program, in Michigan, we have allowed a small amount of money to give people money toward a car, but we do not have an organized weight to leverage those resources. How did America's Family do it?

Mr. Bigari: To create its car program, America's Family personally co-signed for all the loans on cars and put its personal net worth on the line. For the car program in America's Family, there is a specific protocol in place. First, the employer has to send the client through a screening process. Then, the employee guarantees payments to the car dealer. Then, the employee must pass a personal finance class, usually through the Internet. Payments on the car are made through payroll deduction. If the employee chooses to leave the employer, they can a) surrender the car, or b) go to work for another employer that is part of the network.

Q: Do all of your clients apply on-line to you?

Mr. Bigari: Yes, which is one reason why America's Family seeks to open a new upcoming call-center model in the near future.

With that last question, Mr. Bigari closed the floor from any more questions but reminded the audience that they could learn more about America's Family at www.amfol.com or they could contact Ovetta Sampson by email at ovetta@amfol.com or by phone at 719-638-2071, ext. 11.

7. CITY DIALOGUE

Following the luncheon session, each city team was given an opportunity to ask one question to any of the other city teams. This session was designed to allow cities to improve their understanding of some of the promising practices highlighted in earlier sessions, and to establish points of contact for future collaborations with the other cities. The following section of the report summarizes the questions that were asked and the answers that were given during this session of the Academy.

Q: Atlanta asked St. Louis for more information on the Department of Workforce Development (DWD). Specifically, is this Department part of the TANF agency? Do they handle workforce issues or other income maintenance services?

A: St. Louis responded that DWD is another division in Missouri, separate from the TANF agency. Staff are social service case managers dedicated to moving people to work by using partner agencies for assessment and additional duties.

Q: Baltimore asked Atlanta to more fully describe the Work Adjustment Program as compared to the Work Experience program.

A: Atlanta responded that the programs, while having similar names, are not the same. They operate on two distinct time frames. The GoodWORKS program is funded by two grants: one Competitive and one from the State. Clients enrolled in the work adjustment program must have their TANF cases closed. Wages are paid with grant funds. These are NOT Regular Federal TANF funds.

Q: Detroit asked Omaha to expand on the concept of the two-generational approach to career preparation and job readiness.

A: Omaha has a community mental health provider for adults who provides a job preparation program, modeled after “group therapy.” The shared disclosure of barriers and challenges leads to work preparation models. They also offer a parenting skill development training. Omaha has found that receipt of the cash grant and food stamps does not motivate parents nearly as much as access to health insurance for their children.

Q: Grand Prairie wanted to hear more about Seattle’s Post Employment Call Center.

A: Seattle responded that the average wait time is approximately ten minutes and the service is funded by the Worksource office.

Q: Miami asked for more information about Atlanta’s 15-1 caseload ratio.

A: Atlanta’s GoodWORKS program is an initiative funded by the Department of Labor and the Department of Family and Children’s Services (DFACS). The Office of Workforce Development operates the program. Each participant is assigned a personal advisor, who is available at any time to assist in identifying and removing barriers to successful employment. Participants earn rewards for maintaining employment.

Q: Minneapolis asked both Baltimore and Grand Prairie about how they are handling mental health and learning disability issues. How do you build relationships with providers for timely and continuous care?

A: Baltimore responded that the mental health providers are located in all centers and in the child welfare divisions. The city operates services under contract with Baltimore Mental Health Services (BMHS), who sits on the team for the Urban Partnerships Initiative.

A: Grand Prairie’s Department of Mental Health and Mental Retardation is under contract to provide services to TANF families. Two counselors serve on the TANF staff.

Q: Oakland wanted more information about Grand Prairie’s in-home computer program. How does it work? How is success measured? How is full engagement defined and certified in the absence of monitoring and supervision?

A: Grand Prairie responded that the computers in the home are part of a post-employment service and are provided under contract. Evaluation is funded with Welfare-to-Work dollars and is based on the likelihood a family will return to TANF, earn a higher wage, and experience quarterly wage increases

Q: Omaha asked about Atlanta’s three-tiered system for TANF recipients and inquired specifically about funding.

A: Atlanta brought the Workforce Investment (WIA) system in for the planning stages. The program uses three funding streams—some formula funds are still remaining with an extended expenditure date. Funds are used to pay wages for Work Adjustment participants.

Q: Seattle requested more information about Minneapolis’ public health nursing program.

A: Minneapolis responded that the program runs on a per client payment of less than \$1,000 per client.

Q: St. Louis asked Atlanta for more information on their GoodWORKS TANF Orientation. How is it scheduled with multiple people coming in all day? Are the incentives for people based on time spent working? How is the program funded?

A: Atlanta responded that the program orientation session is performed by recruiters during the initial home visits. Appointments are made so there are no “walk-ins.” At the orientation, clients undergo drug screening, and complete initial paperwork for background checks. Employment incentives are funded with Welfare-to-Work Family Self-Sufficiency funds.

8. CONTINUUM OF SERVICE—NEW COMMUNITY RESOURCE PANEL

Mr. Clarence Carter, Director, Office of Community Services

Ms. Joyce Dorsey, President and CEO, Fulton Atlanta Community Action Authority

Ms. Diane Neill, Regional Outreach Coordinator, Office of the Attorney General

Ms. Barbara Cassell, Vice-President of Client Services, Dallas Housing Authority

Ms. Anita Carwile, Wage and Investment Division, Internal Revenue Service

Mr. Steven Dow, Executive Director, The Community Action Project of Tulsa County

This panel session provided city participants with new insight into often under-utilized services available to support families. Mr. Clarence Carter introduced the panel as an opportunity to hear from real resources at the community-level to build the social services continuum. All TANF programs should consider working with such vital partners as local Community Action Agencies and Multiple Service Providers, Child Support Enforcement Offices, Local Housing Authorities and Family Self-Sufficiency (FSS) programs. Programs should work to help families build assets with the Earned Income Tax Credit (EITC) and Individual Development Accounts (IDA).

Joyce Dorsey is the President and Chief Executive Office of the Fulton Atlanta Community Action Authority (FACAA), a local organization that provides a cadre of services. Ms. Dorsey encouraged city teams to explore Community Services Block Grant (CSBG) -funded services. Because TANF clients have already met with a referring agent, they are pre-certified as eligible recipients of services. The Fulton Atlanta Community Action Authority also works with various Workforce Development Boards to access employers who are ready to hire TANF clients. Ms. Dorsey emphasized the need to partner with other organizations and agencies that are “sensitized to the population.”

Diane Neill is with the Office of the Attorney General, the Title IV-D agency, in Texas. As one of 13 regional outreach coordinators for that office, Ms. Neill primarily coordinates with local agencies in the Dallas area. She works with the Texas Workforce Commission (TWC) to deliver the video-based curriculum “Paternity and Parenthood (PAPA)” in schools. Ms. Neill’s office also operates a hospital-based paternity program, which works with both parents at the time of birth to establish paternity and legal fatherhood. The program enjoys high rates of success and works with parents to develop parenting skills.

Other programs serve incarcerated noncustodial parents to support interaction between the family and the incarcerated member. When a client goes to court because of failure to pay child support, collaborative efforts between the Texas Attorney General and the judiciary are used to offer voluntary referral to the Texas Workforce Commission. This program began in Behr County and moved onto Harris County before being rolled-out statewide.

The Texas Attorney General (AG) supports the Texas Fragile Families Initiative (TFFI), which is operated by the Dallas YMCA. The TFFI works with the YMCA to bring the fathers in and to offer resources. They are currently conducting policy audit at AG to determine if their policies are TANF friendly, particularly to those with child support arrears. The general expectation among these men is that that they will be arrested for failing to pay, but the AG’s offices recognizes that incarcerated men cannot make their payments.

Another collaborative effort with the Texas Workforce Commission supports custodial parents about to be sanctioned off TANF. The AG provides services, discusses fatherhood rights, and often asks them to volunteer in their offices. This volunteer experience often positions people favorably when paid employment opportunities arise. The philosophy is that more involvement from both parents yields a reduced likelihood of TANF receipt.

Barbara Cassell of the Dallas Housing Authority (DHA) offered her insight about the ways Housing Authorities and TANF agencies can partner to serve families. Housing Authorities, according to Ms. Cassell, “bring an opportunity to do more with less.” The Department of Housing and Urban Development’s (HUD) Family Self-Sufficiency (FSS) program is a voluntary program for people in public housing (“residents”) or those receiving Section 8 vouchers (“clients”). There are approximately 2,000 current FSS participants in the Dallas program, which predates the HUD mandate and has served nearly 18,000 participants in total. The “FSS program allows programs and staff do what needs to be done to overcome barriers to self-sufficiency.” For example, the Dallas Independent School District (DISD) provides a GED or literacy instructor if the DHA can get 18 participants to agree to meet in one place. The DHA assists with child care and transportation (public transportation—monthly bus pass, daily token, minimal assistance for repairs, fuel). They collaborate with the Texas Attorney General’s Office, the energy agencies, and others.

One of the most exciting features of the FSS program is the housing escrow plan. When residents go to work and experience an earnings gain (which would cause rent to increase proportionally), the DHA collects the new rent differential and puts it in an account for the client. At the end of the five years, the money accrues and is given to participants when they leave public housing. Interest continues to accrue if residents do not move out immediately at the end of five years.

Anita Carwile works with the Wage and Investment Services Branch of the Federal Internal Revenue Service (IRS). As part of the year 2000 agency reorganization program, emphasis shifted from compliance and post-filing issues to education, outreach and pre-filing issues. Ms. Carwile described the change as having created a “kinder and gentler IRS.” Ms. Carwile presented on the often-underutilized benefits of the EITC as a means for supporting low-to moderate-income families. She also spoke about the availability and uses of the Child Tax Credit.

EITC is a refundable tax credit for low-income workers that lifts more working families out of poverty than any other Federal program. In 2001, almost 19 million working families and individuals received over \$31 billion in EITC refunds. All tax credits reduce tax liability dollar for dollar. If a *non-refundable* tax credit exceeds total tax liability, any remaining value is lost.

However, if a *refundable* tax credit exceeds total tax liability, any remaining value is refunded to the taxpayer. The EITC promotes work because earned income is required to qualify.

Like the EITC, The Child Tax Credit (CTC) is a refundable tax credit. It is available to families with children who earn more than \$10,350. Credit is ten percent of earnings over \$10,350 with maximum of \$600 per child. While both of these tax credits have the potential to make significant impacts on the total available income of many families, studies indicate that 15-25 percent of eligible workers are not claiming the EITC. A recent IRS audit found that over 600,000 potentially eligible families did not claim the CTC in tax year 2001.

Outreach and education are essential to breaking down the barriers that prevent eligible families from failing to take advantage of these two tax credits. In 1999, 68 percent of tax returns were done by preparers and the associated high-interest loans quickly add costs to the process. Funds diverted toward filing costs totaled \$1.75 billion. The Federal Reserve Board estimates that 22 percent of low-income families have limited skills and experience with money management, and do not even have bank accounts. The IRS is working with community-based organizations to develop financial literacy and encourage eligible families to claim these tax credits.

Steven Dow is the Executive Director of the Community Action Project of Tulsa County (CAPTC), Oklahoma. He opened his presentation with the concept that the history of family support policy has focused on anti-poverty and income maintenance programs. In place of this historical understanding, Mr. Dow argued that policy should be addressed to looking at “working for the non-poor” because, the income gap is less important than the wealth gap. It is instructive to ask questions about why and how wealth concentration happens, and how those same principles apply to the low-income community. The tax code is the primary vehicle for wealth creation and a powerful tool to change behavior, but tax liability does not resonate with the low-income population.

Individual Development Accounts (IDAs) are an essential tool to leverage the power of money, but most other programs do not encourage asset building. In fact, for means-tested programs, the asset test discourages the development of wealth. IDAs are different. As matched savings accounts, they couple savings with economic literacy and attempt to develop asset ownership. Mr. Dow espouses a theory that assets will increase in value over time, thereby improving economic security over time, even if they do nothing else. Conversely, increasing income and reducing expenses does not always lead to improved economic situations. Many low income families would benefit from skills-building in money management for credit repair, liquid savings for emergency response, utilizing ways of taking residual income in asset investment as a leverage for buying, saving, educating, etc. The training delivered by the

CAPTC produces powerful, transforming effects for the entire household, reinforces the importance and value of savings, and encourages families to plan using a long-term perspective.

9. CITY CLUSTER BREAKOUT SESSION—THE CASE STUDY

For this session of the Academy, the ten city-teams broke out into three different cluster sessions to analyze a case study and participate in an asset-mapping workshop. Mr. Kent Peterson of Caliber Associates facilitated Miami, Minneapolis, and Omaha in Cluster One. Atlanta, Baltimore, and Grand Prairie made up Cluster Two and were facilitated by Ms. Karen Lynn-Dyson of Caliber Associates. Dr. Freddie John Martin of Caliber Associates guided Detroit, Oakland, Seattle, and St. Louis in Cluster Three. The activity was designed such that within each cluster, city-teams would individually analyze the case study and map city assets. Then, the cluster as a whole would compare and contrast the respective cities' strengths and weaknesses of service and brainstorm common assets and themes as a collaborative group. The Academy agenda allotted time for each cluster to report their results back to the group on Day Three. This section of the report briefly describes the City Cluster Breakout Session and the case study.

The case study was designed to represent a typical TANF client that presented multiple needs so that city-teams could analyze a TANF case together in a holistic way. With various agencies such as housing, substance abuse, mental health, or child care represented on each city-team, this activity could then capture how each respective agency would respond in their specific role to serving the client. In turn, as the city-teams analyzed their case study, the experience of working together at the table as a team created a microcosm of what actually happens on a broader scale when multiple agencies throughout a city must come together to serve a client. Together, each team could identify organizational assumptions, recognize agency differences, realize potential points of conflict, and assess service strengths, weaknesses, and gaps.

Cities were placed in clusters based on common issues and service obstacles that they mentioned prior to the Academy. Within each cluster, the city-teams individually participated in an asset-mapping exercise to assess their TANF service strengths together by filling out a matrix of different service areas. In this exercise, the city-teams evaluated themselves on different dimensions and identified areas where they would like technical assistance.

After the asset-mapping activity was complete, city-teams were given time to collaborate together as a cluster to identify similarities, differences, and common themes in the individual cities' asset assessments. The cluster was instructed to determine strengths and weaknesses of service as a group. To complete this portion of the exercise, the city-teams within each cluster had to work together to draw conclusions for the group as a whole. Facilitators from Caliber

Associates worked to foster this communication by providing guidance, structure, and synthesizing comments.

10. ACADEMY DINNER: ENGAGING EMPLOYERS

Mr. Jim Gatz, Office of Community Services

Ms. Karen Shawcross, Bank of America

Ms. Denise Dierson, Integrated Health Services, Inc.

For the dinner session of the Day Two of the Academy, Mr. Jim Gatz of the Office of Community Services moderated two presentations about how to engage the private sector as agencies attempt to serve TANF clients effectively. This session addressed questions such as “What supports do the clients bring with them that would make them desirable as potential employees?” and “What strategies are needed to employ and keep TANF clients in the workforce during an economic downturn?” To provide insight and some answers to these questions, presenters included Ms. Karen Shawcross of Bank of America and Ms. Denise Dierson of Integrated Health Services, Inc.

10.1 Bank of America: America Works Initiative

Ms. Karen Shawcross of Bank of America presented the America Works Initiative, Bank of America’s employment outreach program for welfare recipients, and America Banks!, a financial literacy initiative.

Designed to help move families from welfare to self-sufficiency, the America Works program has placed over 7,000 welfare recipients in career path jobs with Bank of America. Their retention rates are high, and they enjoy strong loyalty from the former welfare recipients. This loyalty engenders a commitment to continuing the initiative because these new employees have shown themselves to be good investments.

An extended outreach program is operated in partnership with national and local groups. These groups educate recruiters and use customized pre-hire training programs to prepare workers for their new employment responsibilities. Outcome evaluations in two California sites indicate a 2.5 year retention rate of 77 percent. Thirty percent of those still on the job after 2.5 years had received promotions, and all had pay increases of between three and 15 percent.

America Banks!, a sister to the America Works program, is a financial literacy initiative designed to provide basic money management training to low-income adults. The program

targets both low-income and immigrant groups to help them avoid financial pitfalls. Bank of America operates America Banks! pilots in partnership with local and national organizations.

10.2 Integrated Health Services, Inc.

Ms. Denise Dierson of Integrated Health Services, Inc. described how her organization partnered with Tarrant County's Work Advantage Program to design and implement a program to hire TANF clients as nurse aids in Texas nursing homes. Integrated Health Services, Inc. is a national health service organization. Before the success of this partnership, Ms. Dierson described how finding, hiring, and retaining nurse aids was a persistent problem for nursing homes and the nursing profession. There are currently 67,000 unfilled nurse aid positions nationwide, and 4,000 unfilled positions in Texas. Plus, although turnover rates for nurse aids are generally high, Texas' rate was 119 percent of the national average.

Ms. Dierson described the critical components that allow the partnership to thrive. Work Advantage provides the up front effort by supplying funding, recruiting TANF customers, providing case management services, and paying half of employee's salaries. They also have a sub-contract with an English as a Second Language (ESL) provider to offer language services to Spanish-speaking TANF clients. Integrated Health Services provides a 3-week paid training for all participants and offers a salary raise upon completion. Also, after completion of the initial training, nurse aides are hired by I.H.S., and receive a new title, special tags for their sleeve, and various other means of recognition. During employment, TANF recipients are placed into a structure of wage progression and can access a vocational ESL program for health care as well.

To date, this partnership has trained and employed 260 TANF clients. It targets the LEP population and has employed customers from the Latino, Vietnamese, Cantonese, and South African immigrant communities. Plus, it has retained over 50 percent of their new TANF employees for six months beyond course completion, a goal that Ms. Dierson initially worried was unreachable. Moreover, as a result of the program, the previous 30 percent job vacancy rate for nurse aids was reduced to less than three percent, and I.H.S. even has a waiting list with more potential employees waiting to receive the three-week training.

Ms. Dierson ended her presentation with a section on "lessons learned" and advice she could give to future agencies thinking of embarking on a similar endeavor. She emphasized the passion of the partners as a key to success.

10.3 Questions and Answers

Q: How has the experience been of hiring people with no English skills?

Ms. Diersen: Initially, the floor was set at a third-grade English proficiency level. However, the standard was raised to a fourth-grade level in response to some challenges with the less proficient speakers. Texas' State nursing exam can be taken in Spanish, which is a great benefit to the Latinos in the program, but other language groups require more instruction.

Q: Is Bank of America replicating the program you described across the nation?

Ms. Shawcross: There are similar programs, such as with operators and customer representatives. Whenever new jobs open, the program can be operated with that new position.

Q: For the nurse aide program, did you have any trouble accessing one-stops?

Ms. Diersen: One-stops vary from county to county. Access was not a problem. Rather, one-stops were very willing to help, although, they didn't seem to offer everything needed. For example, they couldn't offer a customized training program. If anything, they could only offer it off-site.

Q: Can the Certified Nursing Assistant exam be taken for State language credit?

Ms. Dierson: Participants take the State exam and then the career ladder program takes over. Advanced nursing courses cover such issues as communication, anger management, and other issues not covered in three weeks. Participants gain skills to succeed in the workplace. The system lends itself to individualized progress for each participant.

Q: Working with a Spanish-speaking population is easier than working with immigrants speaking other languages. What about non-Spanish speaking immigrants? Do they get English proficiency and technical training services?

Ms. Dierson: Because the Dallas Metroplex has a high concentration of Latinos, we don't really work with those issues. Northeast Dallas County has a high proportion of South Africans. They are English speakers, but the dialect and accent are still major barriers and language training is necessary.

Q: Do you work with Welfare-to-Work as an employer? What is the consideration in terms of work engagement?

Ms. Shawcross: Bank of America sees this as a community development effort. The operating philosophy is that institutions are only as strong as the communities they serve, and Bank of America has a long history of social responsibility. Tracking recipients inspires momentum for the program, which, in turn, gives employers an incentive to continue participating.

Q: Can you speak more about America Banks!? What are the pilot site locations?

Ms. Shawcross: The pilot is in 21 States and the District of Columbia. All cities participating in the Academy, except Detroit and Omaha, are pilot sites. Bank of America works on this initiative from both sides—either brokering venues locally or else finding potential venues and looking for volunteers. There is a growing understanding of the buying power of Latinos, which has resulted in increased hiring of bilingual associates.

11. DRIVING PERFORMANCE IN URBAN HUMAN SERVICE PROGRAMS

Mr. Andrew Bush, Director, Office of Family Assistance

Mr. Grant Collins, Chief of Staff, Office of Family Assistance

Ms. Jackie Savage, Executive Director, ConnectInc.

Day Three, the final day of the Academy, began with a demonstration of a local case management tool. Mr. Andrew Bush moderated the discussion, facilitated the pace of the demonstration, and led the Academy participants through intermittent intervals of questions and answers throughout the session. The panel was chaired by Ms. Jackie Savage, Executive Director of ConnectInc., who guided the audience through most of the demonstration. Panelists included other representatives from ConnectInc. such as Ms. Mary Mallory and Mr. Harry Shaughnessy as well as Mr. Richard Stevens from Cognos.

11.1 Program Description

Mr. Andrew Bush started the session off with a few brief words of introduction. He introduced the panelists and stated that this demonstration would be the final Federal presentation of the Academy. Spotlights on the panel were representatives from ConnectInc., a North Carolina based nonprofit agency, who would be using live on-screen software to walk the audience through the many facets of their computerized local case management tool. Through this demonstration, Academy participants could witness how a case progresses through the system with the tool and learn how the software offers a valuable asset to case-workers as they attempt to serve a TANF case. Mr. Bush moderated the panel and highlighted different uses of the tool.

Ms. Jackie Savage began her portion of the session by describing ConnectInc. This nonprofit agency is based in rural North Carolina and serves approximately 8,600 customers. They focus on career advancement and asset accumulation for their TANF clients with the overall goal of moving families off welfare into the working arena. They are a collaborative group, emphasize results, and “...do economic development one individual at a time.” What

makes ConnectInc. unique in their State is that they developed detailed case management software to assist their caseworkers in serving TANF clients. They pride themselves on being a paper-less organization because this comprehensive tool encompasses all needed aspects of service provision. The purpose of the tool was to provide a support system for caseworkers and to help protect the investment that ConnectInc. had made as they moved TANF families to self-sufficiency. Using this user-friendly computerized case management tool, ConnectInc. was able to revolutionize the services they provided to TANF families in rural North Carolina. Boasting impressive results of moving families from welfare to work, last year, they only had 48 clients cycle back on TANF, all due to health reasons. Ms. Savage relayed how honored they were to be here and articulated her desire to report exactly what her agency was able to achieve. Potentially, other city-teams at the Academy might find this tool useful and seek to adopt it for their respective welfare systems.

Turning her attention to a more detailed description of the tool, Ms. Savage elaborated how this tool can provide caseworkers with up-to-the-minute information about each of their TANF clients. It has helped front-line workers at ConnectInc. stay organized and serve their cases more efficiently and effectively. As the audience watched, Ms. Savage demonstrated how to enter case information, how to modify existing information, and how to access different features of the tool. With this technology, Ms. Savage showed how her caseworkers can know where every one of their clients are at all times. The tool brings modern day business principles and technologies into the welfare arena and provides a way to synthesize large amounts of complex information in a very simple way. An identification record is created for each TANF client. Customized buttons help caseworkers to access different topics of client information instantly. Furthermore, Ms. Savage elaborated how the tool helps to standardize casework. At the very minimum, just seeing all the fields in one itemized place forces front line staff to consider all elements of a case and helps workers remember all the potential resources that they have available to them as they attempt to serve their TANF customers.

Through intermittent suggestions, ideas, and demonstrations, Ms. Savage, Mr. Bush, and Mr. Collins all joined together to spotlight different aspects of the tool for the audience. Features that they noted include:

A “Pre-fill” function—After entering data into one text field, that data will automatically replicate in other related text fields.

A “Must-fill” function—Does not allow the worker to move to a new screen unless certain fields have been filled. Serve as a good reminder for caseworkers and help to standardize casework.

A “Customize” function—Caseworkers can customize their own version of the tool and build-in new fields that they feel will be helpful.

A “Pop-up Reminder” function—Caseworkers can build in reminders to pop-up at different points of the case, such as “Did you ask about EITC yet?”

The “Hourly Wage Calculation”—Caseworkers can enter in the hourly wage of their TANF client, and the software will calculate how many projected hours of work it would take the client to transition off welfare. “This might be the number of hours the client needs to no longer qualify for food stamps,” Mr. Collins mentioned, “This is the date that this client could feasibly transition into self-sufficiency.”

The “Resource Center” feature—Provides a list of all available services and resources organized by type or by city. When looking for any service provider, a caseworker could click through all the available options.

A “Universal Access” feature—Especially helpful to keep available listings in the Resource Center up-to-date. As soon as one worker updates a new phone number or adds a new service provider, all other workers have access to the new information.

A “Training Info-Center” feature—Training manuals and service protocols can be entered into the tool, so all workers have access to up-to-date training manuals if they ever have questions or need to review protocols.

A “Linking” feature—Web-links can be added to supplement the tool. For example, links can be placed in the Training Center to provide workers with access to other training resources, additional reading information, and related websites. This feature also allows for the linking of exterior documents, assessment forms, and application forms, so all workers have all the needed forms at their disposal.

A “Notes” field—Near every field of data, there is a supplemental “notes” field within which caseworkers can type in elaborations, details, and case notes.

A “Case Challenges” feature—This feature allows caseworkers to itemize different challenges and barriers facing their TANF customer such as mental health issues, substance abuse, or child care. Workers can group challenges, rate challenges by severity, and track the progression of case challenges over time. Plus, workers can review cases by analyzing this feature.

A “Quick Print” feature—Caseworkers can enter all the fields of an agreement with the client, quickly print the page, and have all parties sign the form.

A “GIS Mapping” feature—Includes interactive maps of the area. Caseworkers can map where their client lives, map the client’s employer, and map all the services providers with whom the client is working. This feature can help workers assess transportation difficulties of their clients. It can also display all the nearest employers

with job openings, all the nearest child care providers, and all the closest bus stops, for example.

A “Job Matching” feature—Lists all the skills that potential employers require and matches them with job skills of the TANF client. This feature assists in finding good employment matches, which in turn increase the likelihood of job retention.

A “Calendar” feature—Allows the caseworker to organize each client’s weekly schedule and in turn, know where they are at all times. As a result, caseworkers can know when the client has free time to schedule meetings. It helps streamline scheduling difficulties.

In addition to all the tool’s helpful features for caseworkers, Mr. Bush also elaborated how the tool can assist case management from the perspective of a manager or supervisor. He enumerated different “back-end” features of the tool that allow supervisors to run case reviews, case progress reports, longitudinal reports, and aggregate caseload reports. The tool could be used by managers not only to train front line staff but also to run helpful reports about the caseload. Examples of Mr. Bush’s suggestions for management reports include:

A Case Primary Participation Report—Helpful for assessing the agency’s overall caseload. Can be broken down by different offices throughout the city. Can be used to compare and contract the performance of different case management teams. Provides a great weekly snapshot of the caseload for managers.

Reports based on Client Profiles—Examples of different reports might include summaries of most common barriers, most critical barriers, or average number of barriers per client across the caseload.

Reports to compare the performance of vendors—Can compute data to assess which vendors are having the most impact, to what degree, and/or how the stratification of vendor performance may have changed over time. Essentially, managers can generate “report cards” on each of their vendors.

Case Progress Reports—Helpful to assess your agency’s efficacy by computing data to answer managerial questions such as “how many cases made substantial progress versus how many cases made minimal progress throughout the month?”

Richard Stevens of Cognos also elaborated how these reports let managers seamlessly maneuver from one business question to another, providing data to answer each one. Mr. Stevens also explained how the technology comes with a web-based portal that can add customized web-links to any report. Lastly, Mr. Stevens demonstrated some visual elements of the Cognos technology such as graphical city maps.

11.2 Questions and Answers

Q: What level of systems integration is necessary to make this system work?

Ms. Savage: Integrated systems are not necessary. In North Carolina, we do not have integrated systems. Technological advances have not reached all parts of the North Carolina population.

Q: What types of reports are available for printing with this system? Is there a way to get the data from subcontractors and formulate that into one customer report? Does the system track participation rates?

Ms. Savage: Any field you see within the tool, you can run a report and print it, participation rates included. We have a partnership with different subcontractors such as various nonprofits, a resource center, and mental health, and we collaborate and have different subcontractors adding in their data. Through technology, we are able to bring a variety of people to the table and link them all together.

Mr. Bush: You could even imagine versions of these tools that you might use with your employment contractors and housing subcontractors. You can make the data formats of both your systems match up with each other and combine your information. For example, from your office, you can remotely access a contractor's system and extract the information you need. Potentially, everyone involved could share the same database.

Q: Does this system interface with the child welfare system? You didn't show any examples of case characteristics such as "history of neglect or abuse" or "family preservation services." Also, can this system interface at the Federal level?

Ms. Savage: This system can be Web-enabled. It can be software. Its capability is to meet whatever your needs are. Web-enabling would facilitate interfacing with the Federal level. While this mocked-up presentation did not include the family violence/child abuse fields, they could be included as part of the database. In all things, this system had to work in a very simple and user friendly way because the people running it are not technically inclined.

Q: How do you deal with confidentiality issues? Secondly, what kinds of funding and technology does an organization need to implement this tool?

Ms. Savage: Everyone working with the information in the databases is an agent of the county. Everyone signs confidentiality statements. Two attorneys sit on the Board, and program directors maintain strict control over who sees the tool. However, this tool is not only for caseworkers. For TANF families who want to use certain parts of the tool, they can link into the system from any kiosk in the community.

Mr. Bush: The technology is certainly capable of helping to manage appropriate access. There is technology that allows you to think through what you want to remain strictly confidential, what you want your workers to have, and/or what you want everyone to have.

Q: In the Job Listing section, do you only list open jobs?

Ms. Savage: All employers are listed. ConnectInc., maintains a constant relationship with all local employers because new jobs open all the time.

Q: For the Limited English Proficiency (LEP) population, how are translation services built into the system?

Ms. Savage: Through conference calls, we have a very sophisticated phone system that provides translation services over the phone.

Q: First, what are the operating costs of the tool? Second, how long did it take to develop?

Ms. Savage: The tool is always evolving and always developing more. It's never stagnant. ConnectInc. is committed to the principle that "the software will never drive our agency. The agency drives the software."

Q: How do you keep the system updated with the most recent information from service providers?

Ms. Savage: ConnectInc. uses many strategies to keep information current. They receive a disk that provides information on all the State day care centers, and another that lists all the local companies/employers. The system allows for extremely easy integration of this information.

Q: Is this the only system that staff have to use, or are there multiple systems? How many North Carolina counties are currently using this system? Is it in use anywhere else?

Ms. Savage: There is only one system, and it is in place in nine counties in North Carolina. It is one of a kind.

Q: How do the nine counties in North Carolina pay to use this tool?

Ms. Savage: TANF dollars, as well as MOE money. At the Federal level, I heard someone in the audience say that there is HUD money as well. There may be HUD money to use to springboard this program for you.

Q: Who is currently utilizing this program within North Carolina? Welfare agencies? Your human services agencies?

Ms. Savage: Currently, the system is mostly being used by social and human service agencies. ConnectInc. staff will be meeting with our Secretary of Health and Human Services to see if the software can be implemented as the entire State-wide system.

Q: We could really use this system in our region. Are you here to just give us information, or are you here to bring this system to us?

Ms. Savage: ConnectInc. has been designated as a best practice in the past. Now, the operating mentality is “this is just what we do, and it works for us. We figured we’d come share it with you.” You can access the tool. It is not just for us to show here. Krag Reinertson with GTSI, a marketing and sales organization, is here as a resource for you if you want to look into receiving this tool.

Q: What is the average learning curve on this tool, both for the family and for the caseworker?

Ms. Savage: There are public education classes to learn about it, as well as online tutorials. Classes range from one to two days for each of the features that I’ve shown you. By necessity, the tool is very easy and user-friendly.

Q: What historical data do you have available? Is it snapshots or is it trends?

Ms. Savage: Data can be analyzed either by snapshots or by trends. Reports can be customized to meet the needs of the particular audience (State or Federal government, for example) in a very easy, results-oriented way.

12. CITY-TEAM PLANNING

This session of the Academy was included in the agenda to provide the city-teams time to dialogue together around specific topic areas generated during the previous day’s case study exercise. The open-ended portion of the agenda gave the cities time to share ideas and brainstorm future collaborations to meet the needs of the hard-to-serve TANF population. Academy participants formed groups with their counterparts from other cities to create partnerships around specific topic areas such as child support enforcement, post-employment strategies, substance abuse, and mental health. This portion of the agenda provided an opportunity for the teams to begin to process what they had learned at the Academy and to structure their thoughts around certain topic areas that needed improvements in service.

13. ACADEMY LUNCHEON: THE ROLE OF FOUNDATIONS

Dr. Ira Barbell, Senior Vice President, Annie E. Casey Foundation

For the lunch program of Day Three, Ms. Lisa Washington-Thomas, Family Assistance Program Specialist within the Administration for Children and Families, started the session with some brief introductory remarks. She outlined the purpose and structure of the session and introduced different Federal resource personnel. Mr. Jim Gatz then discussed upcoming OCS funding opportunities and detailed the contents of the OCS handout which he previously had passed out to the Academy participants. Mr. Gatz mentioned the \$25 million available per year for Individual Development Accounts (IDAs) and encouraged the city-teams to avail themselves of other OCS funding streams such as this one. Although every city represented at the Academy currently has at least one IDA grant program, Mr. Gatz noted that expansion money for all of them was available. Lastly, Mr. Gatz introduced Dr. Ira Barbell from the Annie E. Casey Foundation, as the main presenter of the session.

Dr. Barbell divided his presentation into two sections. First, he described different aspects of the Annie E. Casey Foundation and specifically detailed the foundation's Family Economic Success program. He then offered a more broadly focused discussion of the philanthropic sector in general, touching on current trends and available funding and offering advice as an experienced insider.

13.1 The Annie E. Casey Foundation: Family Economic Success Program

Despite a decade of prosperity that brought significant declines in welfare and TANF caseloads, the Annie E. Casey Foundation states that there are still ten million children at-risk of growing up in poverty. According to Dr. Barbell, it is these ten million kids that the Annie E. Casey Foundation cares most about, and as a result, the foundation endeavors to identify approaches, form partnerships, and make thoughtful investments to reach and serve these children. Dr. Barbell explained that these at-risk children are mostly inner-city kids of color that are growing up in declining, disinvested neighborhoods. They are the sons and daughters of urban parents who are poor and lack work skills. The Casey Foundation believes that in order to help these ten million children, a focus must be placed on helping the parents and assisting high poverty neighborhoods to become more supportive environments for these children and their families. To these ends, the Casey Foundation created the Family Economic Success Program based on their last ten years of experience in working with poverty and low-income families. Although Dr. Barbell referred Academy participants to www.aecf.org to learn the details of the program, he still outlined the broad goals and purpose of Family Economic Success. The five core components of the program include:

- To provide job access and employment readiness for these families;
- To reward and reinforce work to accelerate self-sufficiency;
- To increase the savings, assets, wealth, and financial sophistication of low-income families;
- To level the cost of living, especially in inner city neighborhoods, and;
- To strengthen the community services and institutions that are most critical to serving families.

Dr. Barbell acknowledged that although the Casey Foundation has high hopes for the success of this program, they realize that on a broad scale, there's very little they can do to help these at-risk kids. Plus, they cannot approach the task alone. "Not even a large foundation like Casey can buy a different future for kids in this country," Dr. Barbell stated. Instead, the Casey Foundation is looking to create partnerships with other foundations in the philanthropic sector because, as stated by Dr. Barbell, "it is going to take a different set of partnerships and arrangements to really help these kids." On this note, Dr. Barbell turned his attention to a broader discussion of the philanthropic sector and the necessity of partnerships between foundations and government.

13.2 Partnerships between the Philanthropic Sector and Government

Dr. Barbell made the distinction between charity and philanthropy. Charity occurs as a private transaction between a donor and a recipient that treats a symptom of a problem by providing resources. An individual who writes a check to a food bank represents an example of charitable giving. Philanthropy embodies a broader commitment to increasing the public good by attacking the root cause of problems. Dr. Barbell explained that many foundations do only charitable giving. To determine whether a foundation falls under the categories of charity or philanthropy, one must look to whether or not the foundation is strategic in its social action giving.

In the philanthropic sector today, foundations are experiencing an unprecedented amount of change. Declining assets and dwindling endowments have forced foundations to reassess their priorities and reconsider their investments in light of their lower budgets. Consequently, many foundations are now making program-related social investments instead of the financial investing that they conducted a decade ago. Dr. Barbell succinctly summed up this new trend by stating, "Changing asset bases have led to an increase in social investing by foundations."

Dr. Barbell also corrected the stereotypical misconceptions that many people hold about foundations. First, with respect to size, he explained how the vast majority of foundations employ no staff, and of the ten percent that are staffed, they only employ an average of one to

two people. Many people think of the big foundation names like Ford, Casey, and Packard, but Dr. Barbell emphasized that these large foundations are outliers. He encouraged Academy members to revise their conception of foundations to small, understaffed, organizations. Last year, close to five thousand new foundations were formed, and of course, not all of them enjoy the large endowments like the most sizeable foundations do. Therefore, Dr. Barbell stressed that most foundations are not large and full of endless money. To this end, cities and State agencies must reshape their notions of funding partners and rid themselves of the mindset that only looks to large foundations for money. Dr. Barbell sought to repaint the modern image of foundations as small “collaborative giving vehicles,” venture partnerships between an average of ten to fifteen individuals.

To describe the traits and motivations of foundation funders, Dr. Barbell recounted his experiences over the years and outlined certain key commonalities that he discovered:

Motivated by a desire to give back to their community and make a difference;

They do not want to fund the existing system; instead, they want to change results;

They believe that they can do more than write a check; they believe that they can make a difference with their donations;

They want to be involved with the projects and approach their giving in a hands-on fashion;

They do not have access to good and reliable information. As such, they turn to their peers for information, which potentially leads to misinformation;

They strongly want their giving to have an impact and do not want to be embarrassed by failure. To this point, Dr. Barbell warned the Academy that “if you’re going to seek funding from a foundation, you must minimize the risk of embarrassment to the donors by being operationally sound;”

They exhibit high levels of frustration that they may not be able to make a difference with their money, and;

They do not have an infrastructure in place to find the best research and information about where is best to fund.

Dr. Barbell included this section in his presentation to give Academy participants insight into the minds and motivations of foundation funders. With this insight, Dr. Barbell articulated his hope that more State and local agencies can be strategic about soliciting funding and partnering with the philanthropic sector. He stressed the current existence of a “totally unfocused but substantial amount of money” that the city-teams could tap into if they were strategic about how they went

about it. To guide cities in this strategic thinking, Dr. Barbell ended his presentation with a few recommendations for how cities could go forward. They include:

Invest time in monitoring and understanding your community's philanthropic sector;

Understand the motivations of donors and structure any funding proposal accordingly;

Define the role of the philanthropic sector in your community;

Understand the differences between foundations before you seek to create partnerships;

Avoid the trap of looking only to one big foundation for funding. Instead, build relationships and improve communications with multiple small foundations;

Be results-oriented because you will need to articulate concrete results to persuade funders;

Build operational capacity to deliver your program like you say you will;

Engage foundations in roles that go beyond grant-making. They have personal and political relationships and networks in place that can be as strong of an asset to your organization as their funding, and;

Think about and build knowledge networks to provide foundations with the information they need to make informed decisions about where and how to fund.

13.3 Questions and Answers

Q: I believe that the Casey Foundation has funded a media-concentrated effort to disseminate stories about low-income families and children. What are the Casey Foundations' goals in this new media role?

Dr. Barbell: The Annie E. Casey Foundation has come to the realization that persuasion and influence will only occur if through good information that stands scrutiny. Data and numbers and statistics lose the interest of the public. To create a movement in this country around improving the lives of children and families, it takes more than data. Hence, the Casey Foundation believes in investing to put a human face on the data. To this end, the Casey Foundation has produced a number of documentary films, namely *Legacy*.

Q: Would it be appropriate to think about bringing in a group of philanthropic organizations together into one project? Do they compete? Are they friendly? Do they like to brainstorm together? What would you recommend about this?

Dr. Barbell: Foundations function by the same social norms as a set of individuals. To fully utilize the funding potential of a group of philanthropic organizations, first find out the mission of each different foundation. Identify common ground and points of difference. Then, choose a few key foundations and determine the best person to be at the table from each of them. Then, bring them together and present your proposal. If the foundations are interested in your proposal, let them do the outreach to other foundations for you. Your agency will make the initial pitch to a small group of targeted foundations, and then those foundations will carry your pitch to half a dozen other foundations. The insiders of foundations know more about the politics and friendliness of the different foundations, so you need not worry about that.

Q: How do we learn about the foundations in our area?

Dr. Barbell: A good way to identify foundations in your area is to find a major search engine that lists all the different foundations in existence and do your scan that way.

14. BUILDING BETTER PROGRAMS: PEER TO PEER

The final session of the Academy was a moderated, interactive discussion based on brief presentations made by representatives from each of the three cluster teams. Clusters were:

Cluster One—Miami, Omaha, and Minneapolis

Cluster Two—Atlanta, Baltimore, Grand Prairie

Cluster Three—Detroit, Oakland, Seattle, St. Louis

The session was purposefully structured in response to the content of each Cluster's discussion from the previous day. The discussion focused on the three levels of partnerships that the Academy sought to foster: partnerships between the cities and the Federal government, partnerships among sister-cities, and internal partnerships within each city-team itself. Specifically, Cluster Three focused broadly on next steps in partnering with ACF. Cluster Two emphasized collaborations between cities, and Cluster One highlighted next steps for improving each individual team's service delivery. Following each cluster presentation, audience members were encouraged to further the brainstorming process as a group. The following section of the report summarizes each cluster presentation and the content of each subsequent audience brainstorming session.

14.1 Next Steps: Urban Partnerships with ACF

Paul Leonard, Director of the Department of Workforce and Human Services in Oakland, CA, gave the presentation from Cluster Three. He described the case study that these four cities analyzed. Mr. Leonard then stated that Cluster Three deviated a bit from protocol because they

decided to brainstorm and present about what they learned from the *process* of this group activity, not what they generated as the *result* of their asset-mapping. Leonard divided his presentation in two parts. First, as stated above, he recounted some key points that his cluster learned from this activity:

Each TANF case possesses multiple levels of complexity—From this single case study, this cluster learned that complexity pervades the work that welfare agencies undertake on a whole series of different levels. First, on the systems level because each city-team has a variety of institutions in place, each with its own set of values and operating procedures. Second, on the client level, because the needs of clients are incredibly complex as well. When you combine the complexity of the client with the complexity of the system serving the client, a multi-dimensional matrix of complexity results.

The need to engage all key agencies—because what agencies are represented at the table will greatly influence the solution that the team comes to as to how to best serve each individual TANF case. Team assessments and case analyses may vary depending on what agencies are represented.

It is difficult to analyze one's own assumptions—Through this activity, members of this cluster realized the importance of thoroughly and honestly working through their individual assumptions before they attempt to collaborate with other team members. An honest appraisal of each member's assumptions is necessary for effective teamwork.

Different sectors work independently—and as a result, it can be very difficult to bring them together.

The need for “systemic reform” in both policy and practice—Instead of only establishing a small-scale best practice, teams must learn to take best practices to scale and to really change the systems within which they are working. The context of competing organizational cultures may hinder this process.

Policy is critical—It is essential that teams continue to recognize the importance of policy at the local, State, and Federal levels. Policy provides the framework within which all agencies must work. Agencies must not only learn to work and manage their cases within a given policy framework, but they must also continue to challenge the policy framework itself as well. Policy cannot be a fixed terrain; instead, it is a dynamic and moving entity.

In addition to synthesizing what they had learned, Cluster Three also generated a short To-do List of next steps. These next steps closely mirrored different points of learning. Mr. Leonard outlined the list of Next Steps as follows:

Undertake the challenge of unpacking assumptions—Before embarking on any next steps, city-teams and individual workers must unpack their assumptions in order to be clear about diagnosing problems, strengths, weaknesses, and goals.

Be rigorous in examining results versus perceptions—Too often, policies are driven by perceptions of what is working and not by actual results of what is working.

Keep the policy discussion open—Agencies must not only learn to work and manage their cases within a given policy framework, but they must also continue to challenge the policy framework itself as well. In this sense, agencies should continue to discuss the implications of policy and how policies affect their every-day practices.

Infuse knowledge gained at the Academy into institutions back home—The Academy will be successful when its participants go back home and change the way their institutions do business.

Use new knowledge of peers' programs for validation back home—Now that the cities have learned what other cities are doing, they can each take that knowledge back home for validation of their own promising practices from their respective constituencies.

Identify and overcome differences in organizational culture—For coalitions and collaborations to be successful and effective, members must make efforts to recognize and overcome differences in their various operating mentalities and systems of organizational values.

Examine the composition of your city team—Each team needs to think hard about what agencies they have represented at the table. Which agencies are missing? Which agencies, if any, are there but should not be?

This group needs to get together again—to build on what has been started at this Academy. This cluster believes that the group has only begun to see the tip of the iceberg in terms of opportunities for cross-site learning. Listserves, teleconferences, and future Academies can continue the dialogue that was created here.

Mr. Kent Peterson, the moderator from Caliber Associates, then opened the floor for audience participation to supplement the list of Action Steps that Cluster Three had started. This time, the discussion focused on what members of the audience would like to see with regard to the partnership between the Federal agencies and the cities. Other list items generated by Academy participants included:

The agenda of the Academy needs to be equally defined by the city participants and the Federal partners.

Future Academy agenda needs to have more city-to-city interaction time built in.

Future Academy needs to provide more information about the Super Waiver, grants, and resources.

Academy participants would like to see more information about best practices in the areas of mental health, substance abuse, and learning disabilities.

Future Academy agenda should include presentations about best practices on a national scale or that have been replicated in a variety of settings, as well as local best practices from the ten cities represented at the meeting.

Future Academy panels need to include broader and more varied Federal representation from the Departments of Housing and Urban Development, Labor, Transportation, Commerce, and Agriculture so that Academy participants can learn about additional funding streams and programs.

Future Academy agenda should address the 12 silos of OCS in more detail.

Cluster breakout sessions should be channeled by tracks or topics.

Engage the business community in more depth at future Academies.

Future Academy agenda should offer an opportunity for peer counterparts from different cities to meet and interact.

Future Academy agenda should include more discussion on child-only cases and more challenged TANF customers.

In the future, it would be helpful to concretely spell out the currently ambiguous definition of child well-being at a higher policy level.

Team leaders of the ten city-teams should have a breakout session to discuss the agenda, the focus of the Academy, and other relevant issues.

As a supplement to the dialogue, Mr. Andrew Bush and Mr. Grant Collins spoke as a voice for the Federal partners and posed a few questions to the Academy participants. In order to craft a potential second Academy that really offers what the cities need and desire, they wanted to make sure that they had the cities' full input. Their questions and the participants' answers are summarized here.

Mr. Bush: What do you feel is the best way to bring in the right Federal partners like you mentioned? How would you like to prioritize which Federal partners come?

A: Have a discussion at the Federal level that focuses on shared customer base.

A: From a funding a resource perspective, bring together all the common Federal funders. This would avoid duplication.

A: The discussion needs to go both ways. Listen to the cities as well.

A: Craft a dialogue around policy issues where everyone has a role to play in the design and the understanding of the next Academy.

Mr. Collins: A breakout session with the IRS occurred in the year 2000 to assess how many individuals claimed the EITC. The financial impact of that number is astounding. The IRS found that 1.2 billion dollars was generated collectively, and in these ten cities represented here, 300 million dollars was left on the table. Would it be helpful if I put together a teleconference and some information about this matter?

A: Yes, that would be helpful.

Mr. Bush: About organizing the discussion of another Academy, how would you specifically like a second Academy structured? Would you prefer it to be structured around a topic or a track, around a case, or through group discussion?

A: A series of activities that addresses particular issues such as policy, practice, and application all woven together.

A: Find a way to highlight best practices of each city, but allot enough time for the city to elaborate what the issue was, how they worked through it, how they reshaped it, steps they took to address it, and how they created their best practice.

14.2 Next Steps: City-to-city Collaborations

Cluster Two designed their presentation slightly differently than Cluster Three. Using an audience-friendly, “dating-game” format, the Cluster Two cities drew linkages between client needs and the resources/best practices available in each city. The array of services offered by the cities included employment placement services, transportation, child care, and substance abuse services.

At the conclusion of presentation, the participants engaged in a second interactive discussion of next steps, this time focusing specifically on action steps to bolster city-to-city collaboration. Suggestions from the audience included:

Cities should not wait for a facilitator to initiate their interaction with each other. They should take the initiative to interact on their own.

Cities should jointly look at each other’s asset-maps and assess strengths and weaknesses across the group of ten. Then, cities should do a better job of networking and collaborating based on which city provides best practices in different service areas. They need to take responsibility for networking amongst themselves.

Cities should create a listserv through which they can all communicate, share best practices, brainstorm solutions, and discuss obstacles.

Cities should seek to find similarities amongst each other and pair up based on strengths and weaknesses.

City Profiles that were created for this Academy should be modified to include this asset-mapping information as well as definitions of how each city runs and operates their programs. Then, these revised City Profiles should all be distributed. Profiles should also include more information about economic development in each city.

Better marketing and outreach efforts should help cities to access the experts among them and all learn from and adopt each other's best practices.

Cities should conduct trainings back and forth between each other based on each other's best practices; learn from those that have had more success in each topic area.

14.3 Next Steps: Each Team in Their Home City

Cluster One presented a list of common issues that they identified as needing to be addressed in their cities such as immigrant mental health services, child support, housing, transportation, and neighborhood supports. The cluster then sub-divided into three individual city presentations. A representative from each city briefly presented each city's assets and weaknesses in serving TANF families.

Miami's presentation identified the city's link between public and/or higher education and employment as their unique asset. However, they focused on child support as their main weakness. Not only did they feel like TANF customers in Miami need two incomes in order to transition to self-sufficiency, they strongly felt like they need help in providing better child support services. Other areas for which they identified a need for help include marriage and family stability counseling and housing.

In contrast to Miami, Minneapolis identified their child support system as their single strongest asset. However, they sounded a need for help on mental health issues, specifically, diagnosing needs in hard-to-serve populations such as low IQ clients, customers with learning disabilities, and the LEP population. Minneapolis also discussed tapping into new and creative funding streams. As they face tightening budgets and State fiscal crises, they feel that a duplication in funding is quite handicapping. Instead, they are working to use new funding streams to fund their TANF-related programs.

Omaha recognized their faith-based institutions as their strongest asset. They then listed numerous needs relating to data management such as their need to develop a strategic plan for TANF, the need for hard data to identify gaps in services, the need for an electronic web-based system with outcome-based measures, and the need to learn how to share aggregated data

between providers. Lastly, Omaha recognized the additional need to develop a marketing plan to involve private businesses as they attempt to serve TANF clients.

With the completion of this final cluster presentation, Mr. Peterson engaged the audience in one last interactive discussion of next steps, finally focusing on specific action steps that each team needs to do when they return home. Peterson designed the three interactive discussions to flow from the broadest macro-level next steps such as Urban Partnerships with ACF to the smallest micro-level next steps such as what each city-team needs to do for themselves in the next 60-90 days. A summary of the final audience comments is included here:

- Go back and figure out who really ought to be on the team;
- Select priority areas to focus on;
- Set goals and strategies for the team;
- Conduct more intensive asset-mapping that gets down to the nitty-gritty;
- As asset-mapping occurs, identify potential points of tension during implementation;
- Locate new funding sources;
- Follow-up on recommendations from this Academy such as engaging employers or bringing in resources from the philanthropic sector;
- Identify Technical Assistance needs and linkages, and;
- Achieve a better understanding of what TANF reauthorization is going to look like in your city and in the local context.

Mr. Peterson then closed the final discussion and reminded Academy participants that partnerships are not easy to create smoothly. Partnerships need tending to, especially when they are regionally, nationally, and Federally based. Peterson then thanked the audience members for their candor and their participation and transitioned into the closing session of the Academy.

15. CLOSING SESSION: FINAL THOUGHTS

This Academy provided the ten city-teams with the opportunity to form partnerships on three different levels: urban partnerships with the Federal government, collaborations from city to city, and team-building at the local level. Through an array of sessions that ranged from Federal presentations, city-team presentations, panel discussions, spotlighted best practices, and cluster breakout sessions, the multi-faceted Academy provided city-teams a forum to learn, grow, build, and collaborate. The agenda and design of the Academy was driven by the three

Federal sponsoring agencies: the Office of Family Assistance and Office of Community Services both within the Administration for Children and Families, and also the Office of the Assistant Secretary for Planning and Evaluation.

To bring the Academy to a close, Mr. Grant Collins and Mr. Andrew Bush offered their final thoughts. Mr. Collins expressed his gratitude to all the Academy participants for their attention, their hard work, their great ideas, and their dedication to this Initiative. He stated that this Academy exceeded his expectations with regard to the relationships that were built. Mr. Collins also articulated his enthusiasm to move forward and begin looking at next steps for the Urban Partnerships Initiative in the future. He ended by reminding Academy participants that he would follow-up on the items that were discussed and be in-touch with them shortly.

Mr. Bush reiterated many of Mr. Collins' points of gratitude and also expressed his desire to turn an eye to the future and immediately begin work on this project for the upcoming months. Together, the Academy participants and the Federal partners outlined next steps, and he is ready to start work to implement them. Mr. Bush thanked Caliber Associates, the contracted agency charged with convening and implementing the design of the Academy, as well as other support personnel such as the Audio-Visual team and hotel staff. After wishing Academy attendees a safe trip home, Mr. Bush ended by stating that "what makes it all worthwhile for him is knowing that this Academy was worthwhile and helpful for the ten city-teams."

APPENDIX A:
FINAL ACADEMY AGENDA



Urban Partnerships for Welfare Reform



Final Academy Agenda

**Sunday
February 2, 2003**

- 4:00-4:30 PM **Registration**
- 4:30-5:00 PM **Welcoming Session:** Two of the principals will give a brief overview of the goals for the Academy from their perspective.
Andrew Bush, Director, Office of Family Assistance
Don Winstead, Deputy Assistant Secretary for Human Services Policy, Office of the Assistant Secretary for Planning and Evaluation
Moderator: Leon McCowan, Host Regional Administrator, Dallas, Region VI
- 5:00-5:45 PM **City Introduction and Puzzle Ice Breaker**
Moderator: Jeanette Hercik, Caliber Associates
- 5:45-7:30 PM **Dinner and Keynote Address: "TANF Reauthorization - The Next Phase of Welfare Reform - Critical Challenges for Urban Areas."** Don Winstead, Deputy Assistant Secretary for Planning and Evaluation & Andrew Bush, Director, Office of Family Assistance
 Funding
 Work Activities
 Improving Child Well Being
 Program Integration Waivers
 Improving Program Performance
Moderator: Grant Collins, Chief of Staff, Office of Family Assistance
- 7:30-7:45 PM Break
- 7:45-9:00 PM **Team Building:** Teams will convene in Breakout Suites to reflect on the topics raised in the Keynote Address and begin to think through how TANF Reauthorization and the critical challenges of the next phase of welfare reform will be built into their action plans.
Moderator: Karen Lynn-Dyson, Caliber Associates



Urban Partnerships for Welfare Reform



**Monday Morning
February 3, 2003**

7:30-8:30 AM **Continental Breakfast**

8:30-9:30 AM **Opening Session: The Academy Framework: Purpose, Mission, and Focus**

Developing A Strategy for Effective Service Delivery: Andrew Bush, Director, Office of Family Assistance: Overview of the components of the Urban Partnership Initiative and its intended purpose.

Continuum of Service: Clarence Carter, Director, Office of Community Services: Working definition and relevance of government and community services in the context of welfare reform.

The Power of Information: Don Winstead, Deputy Assistant Secretary for Planning and Evaluation: Prioritizing data collection efforts to support worker decisions and potential impacts for welfare recipients.

Moderator: Lois Bell, Division Director, State and Territory TANF Management

9:30-10:30 AM **CitiStat I: Profiles and Promising Practices**

Moderator: Lisa Washington-Thomas, Office of Family Assistance

10:30-10:45 AM Break

10:45-11:45 AM **CitiStat II: Profiles and Promising Practices**

Moderator: Al Fleming, Office of Family Assistance

12:00-1:30 PM **Academy Luncheon:** Steve Bigari & Ovetta Sampson, America's Family: A discussion of a model for engaging the public, private, and non-profits sectors in achieving client self-sufficiency.

Moderator: Brenda Benesch, Office of the Assistant Secretary for Planning and Evaluation



Urban Partnerships for Welfare Reform



Monday Afternoon February 3, 2003

- 1:30-2:30 PM **City Dialogue:** This session was designed to foster dialogue between the cities and to allow them to improve their understanding of promising practices highlighted during the CitiStat I and II presentations. Each city team was given an opportunity to ask one question to any of the other city teams.
- 2:30-3:30 PM **Self-sufficiency Continuum:** Joyce Dorsey, Fulton County Community Action Authority, Steven Dow, Community Action Project Tulsa County, Anita Carwile, IRS, Barbara Cassell, Dallas Housing Authority, Diane Neill, Texas Office of the Attorney General: The session will highlight vital community-based organizations and key resources for helping families become self-sufficient.
Moderator: Clarence Carter, Director, Office of Community Services
- 3:30-3:45 PM Break
- 3:45-4:00 PM **Building Service Networks Along the Service Continuum:** Grant Collins, Chief of Staff, Office of Family Assistance: This session will introduce the case study exercise and cluster team concepts.
Moderator: Kent Peterson, Caliber Associates
- | | | | |
|--------------|---|--|---|
| 4:00-6:00 PM | Case 1
Three cities
Moderator:
Karen Lynn-Dyson,
Caliber Associates | Case 2
Three cities
Moderator:
Freddie John Martin,
Caliber Associates | Case 3
Four cities
Moderator:
Kent Peterson,
Caliber Associates |
|--------------|---|--|---|
- 5:30-6:30 PM Break
- 6:30-8:00 PM **Academy Dinner-Engaging Employers:** Karen Shawcross, Bank of America & Denise Diersen, Integrated Health Services, Inc: How to market the strengths of clients exiting from welfare to workforce entry. What supports do the clients bring with them that would make them desirable as potential employees? What strategies are needed to employ and keep TANF clients in the workforce during an economic downturn? Participants will gain insight from the private sector.
Moderator: Jim Gatz, Office of Community Services



Urban Partnerships for Welfare Reform



**Tuesday
February 4, 2003**

7:30-8:30 AM **Continental Breakfast**

8:30-10:15 AM **Driving Performance in Urban Human Service Programs:** Andrew Bush, Director, Office of Family Assistance: A discussion of key aspects using data to support service delivery in urban areas and a showcase of a model individualized case management tool.
Moderator: Grant Collins, Chief of Staff, Office of Family Assistance

10:15-10:30 AM Break

10:30-11:30 AM **City-team Planning:** This breakout session provided the city-teams with time to dialogue together around specific topic areas generated during the previous day's case study cluster exercise. Topic areas included child support enforcement, post-employment strategies, substance abuse, and mental health.

11:30-11:45 AM Break & Room Check-out

11:45-1:15 PM **Academy Luncheon-Federal and Private Funding Resources in an Era Budget Constraints:** Jim Gatz, Office of Community Services, Grant Collins, Chief of Staff, Office of Family Assistance, & Ira Barbell, Annie E. Casey Foundation. Academy participants will learn more about Federal funding streams, national demonstrations, and locally based programs funded by foundations. Participants will learn more about how they might access these funding opportunities and take advantage of them. (Additional resource and funding announcements)
Moderator: Lisa Washington-Thomas, Office of Family Assistance

1:15-2:30 PM **Building Better Programs-Peer to Peer:** Each cluster will have an opportunity to talk about what they learned from the previous day's asset-mapping and case study exercise. Representatives from the three clusters will present discussion points to the group as a whole. Specific information should be focused on service delivery, interface with the TANF agency, and how teams would manage program integrity.
Moderator: Kent Peterson, Caliber Associates

2:30-2:45 PM Break

2:45-3:45 PM **Where Do We Go From Here? Action Plans, Resource Needs, and Next Steps for Urban Partners**
Moderators: Andrew Bush, Director, Office of Family Assistance
Grant Collins, Chief of Staff, Office of Family Assistance

APPENDIX B:
ACADEMY PARTICIPANTS AND SPEAKERS



URBAN PARTNERSHIPS FOR WELFARE REFORM



ACADEMY PARTICIPANTS

ATLANTA

Director
Fulton County Office of Workforce Development
115 Martin Luther King, Jr. Drive, SW, Suite 300
Atlanta, GA 30303
(P) 404-730-7940
(F) 404-730-6992
burrell.billingslea@co.fulton.ga.us

Wayne Casey*
Deputy Administrator
Fulton County Department of Families and
Children's Services
2 Peachtree Street, NW, Suite 400
Atlanta, GA 30303
(P) 404-657-5091
(F) 404-651-8209
wdcasey@dhr.state.ga.us

William Cook
Special Assistant to Deputy Administrator
Fulton County Department of Families and
Children's Services
2 Peachtree Street, NW, Suite 400
Atlanta, GA 30303
(P) 404-657-8383
(F) 404-651-8209
wpcook@dhr.state.ga.us

Marcia Culbreath
Program Director
South Fulton Service Center
Fulton County Department of Families and
Children's Services
5710 Stonewall Tell Road
College Park, GA 30349
(P) 770-774-7802
(F) 770-774-7804
Culbreath.M@gomail.doas.state.ga.us

Donna Gunter
TANF Unit Chief
State TANF Office
2 Peachtree Street, NW, Suite 21-203
Atlanta, GA 30303
(P) 404-657-3737
(F) 404-463-7501
degunter@dhr.state.ga.us

Steven Reed
QA Supervisor
Fulton County Department of Families and
Children's Services
1249 Donald Lee Hollowell Pkwy, NW
Atlanta, GA 30318
(P) 404-206-5670
(F) 404-206-5749
Reed.Steven@gomail.doas.state.ga.us

Laura Robinson
Program Director
Northwest Service Center
Fulton County Department of Families and
Children's Services
1249 Donald Lee Hollowell Pkwy, NW
Atlanta, GA 30318
(P) 404-206-5660
(F) 404-206-5664
Robinson.Laura@gomail.doas.state.ga.us

Julius Wilson
Program Administrator
Southwest Service Center
Fulton County Department of Families and
Children's Services
515 Fairburn Road
Atlanta, GA 30331
(P) 404-505-3708
(F) 404-505-3787
Wilson.Julius@gomail.doas.state.ga.us



URBAN PARTNERSHIPS FOR WELFARE REFORM



BALTIMORE

Diane Bell

President/CEO
Empower Baltimore Management Corporation
3 South Frederick street
Baltimore, MD 21202
(P) 410-783-4400
(F) 410-783-4637
dbell@ebmc.org

Anne Clemson

Legislative Affairs
Mayors Office of Employment Development
100 West 23rd Street
Suite 500
Baltimore, MD 21218
(P) 410-396-6392
(F) 410-396-6756
aclemson@oedworks.com

Yvonne Gilchrist*

Director
Baltimore City Department of Social Services
1510 Guilford Avenue
Baltimore, MD 21202
(P) 410-361-2202
(F) 410-361-4090
ygilchri@dhr.state.md.us

Charles Henry

Executive Director
Family Investment Administration
Department of Human Resources
311 W. Saratoga Street
Baltimore, MD 20201-3521
(P) 410-767-7242
(F) 410-333-0099
CHenry@dhr.state.md.us

Brenda Redding

Assistant Director
Family Investment Bureau
Baltimore City Department of Social Services
1510 Guilford Avenue
Baltimore, MD 21202
(P) 410-361-2478
(F) 410-361-4090
bredding@dhr.state.md.us

Gerri Robinson

Deputy Director
Baltimore City Department of Social Services
1510 Guilford Avenue
Baltimore, MD 21202
(P) 410-361-2914
(F) 410-361-4090
grobins@o@dhr.state.md.us

Leroy Smith

Special Populations Coordinator
Baltimore Substance Abuse Systems, Inc
1 North Charles Street
Suite 1600
Baltimore, MD 21201
(P) 410-637-1900
(F) 410-637-1911
lsmith@bsasinc.org



URBAN PARTNERSHIPS FOR WELFARE REFORM



DETROIT

Nichelle Boyd-Ernst

Assistant Director
Child Development Division
City of Detroit Human Services Department
5031 Grandy
Detroit, MI 48211
(P) 313-852-5621
(F) 313-852-5585
boydn@dhs.ci.detroit.mi.us

Jennifer Davis

Strategic Planning Coordinator
City of Detroit Employment and
Training Department
707 West Milwaukee Avenue
Detroit, MI 48202
(P) 313-876-0584 ext. 219
(F) 313-876-0585
jdavis@EmpTrain.ci.detroit.mi.us

Janet Howard

Work First Director
Michigan Department of Career Development
201 North Washington Square
Victor Office Center
Lansing, MI 48913
(P) 517-335-5875
(F) 517-335-5945
Howardj1@michigan.gov

Cylenthia LaToye Miller, Esq.*

Director
City of Detroit Employment and
Training Department
707 West Milwaukee Avenue
Detroit, MI 48202
(P) 313-876-0674
(F) 313-664-5505
millerc@emptrain.ci.detroit.mi.us

Ralph Rayner

General Manager
City of Detroit Human Services Department
5031 Grandy
Detroit, MI 48211
(P) 313-887-1054
(F) 313-852-4837
raynerr@dhs.ci.detroit.mi.us

Janet Strobe

Director
Bureau of Family Independence
Michigan Family Independence Agency
235 South Grand Avenue
Suite 1306
Lansing, MI 48933
(P) 517-373-2535
(F) 517-335-7771
strobej@michigan.gov

Deborah Watson

Welfare Reform Director
City of Detroit Employment and
Training Department
1300 Rosa Parks Boulevard
Detroit, MI 48216
(P) 313-628-2202
(F) 313-664-5505
Dwatson@emptrain.ci.detroit.mi.us

Clarence Willis, Jr.

Deputy Director
Wayne County Family Independence Agency
Cadillac Place
3040 West Grand Boulevard
Suite 5-650
Detroit, MI 48202
(P) 313-456-1024
(F) 313-456-1218
willisc@michigan.gov



URBAN PARTNERSHIPS FOR WELFARE REFORM



GRAND PRAIRIE

Jill Brown

Texas Workforce Commission
Dallas Redbird Workforce Center
7222 S Westmoreland Road
Dallas, TX 75237-2983
(P) 972-283-9152
jill.brown@twc.state.tx.us

Barbara Cigainero

Texas Works Program Specialist, Region 7
Texas Department of Human Services
701 West 51st Street
3rd Floor, Section G
Austin, TX 78751
(P) 512-438-2972
(F) 512-438-3735
barbara.cigainero@dhs.state.tx.us

Jeanne Clark

Texas Works Program Manager
Texas Department of Human Services
Region 3
2526 Jacksboro Highway
Fort Worth, TX 76114
(P) 817-740-6214
(F) 817-740-6399
jeanne.clark@dhs.state.tx.us

Paul Cobb

Disability Coordinator
Texas Workforce Commission
2601 Scott Street
Ft. Worth, TX 76103
(P) 817-531-6780
(F) 817-531-5677
paul.cobb@twc.state.tx.us

Amy Cuellar

Texas Works Lead Program Manager
Texas Department of Human Services
Region 3
801 W. Freeway, Suite 410
Grand Prairie, TX 75051
(P) 972-337-6199
(F) 972-337-6143
amy.cuellar@dhs.state.tx.us

Jeff Humber

Assistant Regional Administrator
Texas Department of Human Services
Region 03 - The Metroplex
801 W. Freeway, Suite 750
Grand Prairie, TX 75051
(P) 972-337-6135
jeff.humber@dhs.state.tx.us

Debby Kratky

Texas Workforce Commission
2601 Scott Street
Ft. Worth, TX 76103
(P) 817-531-6763
debby.kratky@twc.state.tx.us

Debra Smith*

Regional Administrator
Texas Department of Human Services
801 West Freeway, Suite 700
Grand Prairie, TX 75051
(P) 972-337-6135
debra.smith@dhs.state.tx.us

Randal Wier

Texas Workforce Commission
Dallas Worksource
1201 Main Street, Suite 2700
Dallas, TX 75202
(P) 214-290-1046
randal.wier@twc.state.tx.us



URBAN PARTNERSHIPS FOR WELFARE REFORM



MIAMI

Marta Gonzalez

Management Review Specialist
Department of Children and Families
Economic Self-Sufficiency
401 NW 2nd Ave. S-621
Miami, FL 33128
(P) 305 377-7540
Marta_Gonzalez@dcf.state.fl.us

Edith Humes-Newbold

Executive Director
South Florida Employment and Training
Consortium
3403 NW 82nd Avenue
Miami, FL 33122
(P) 305-595-7615 ext. 369
(F) 305-593-5632
jimmy@jep-tec.org

Ramon Martinez

Assistant Director
Strategic Planning
South Florida Workforce Board
3403 NW 82nd Avenue
Miami, FL 33122-5632
(P) 305-594-7615 ext. 263
(F) 305-593-5632
rmartinez@jep-tec.org

Jennifer Mathys

Operations Manager
Department of Children and Families
1317 Winewood Blvd.
Bldg. 3, Room 102
Tallahassee, FL 32399-0700
(P) 850-921-5567
(F) 850-922-5581

Richard Perez

WIA/Welfare Transition Program Manager
South Florida Employment and
Training Consortium
3403 NW 82nd Avenue
Miami, FL 33122
(P) 305-594-7615 ext. 234
(F) 305-593-5632
rperez@jep-tec.org

Jenni Lee Robins

Welfare Reform Specialist
Workforce Florida, Inc.
1974 Commonwealth Lane
Tallahassee, FL 32303-3196
(P) 850-921-1119
(F) 850-921-1101
jrobins@workforceflorida.com

Harriet Spivak*

Executive Director
South Florida Workforce Board
3403 NW 82nd Avenue
Miami, FL 33122
(P) 305-594-7615 ext. 231
(F) 305-593-5632
harriet@jep-tec.org



URBAN PARTNERSHIPS FOR WELFARE REFORM



MINNEAPOLIS

Bill Brumfield*

Director
Hennepin County Training and Employment
Assistance
A-Level Government Center
300 S. 6th Street
Minneapolis, MN 55487-0012
(P) 612-348-5203
(F) 612-348-3932
william.brumfield@co.hennepin.mn.us

Deborah Huskins

Director
Hennepin County Department of Economic
Assistance
A-1005 Government Center
300 S. 6th Street
Minneapolis, MN 55487-0105
(P) 612-348-7605
(F) 612-348-9908
deborah.huskins@co.hennepin.mn.us

Chip Wells

Director
Minneapolis Employment and Training Program
250 S. 4th Street
Room 510
Minneapolis, MN 55415-1372
(P) 612-673-2630
(F) 612-673-2108
chip.wells@ci.minneapolis.mn.us

Sue Zuidema

Director
Hennepin County Health and Community
Initiatives
A-1702 Government Center
300 S. 6th Street
Minneapolis, MN 55487-0172
(P) 612-348-4382
(F) 612-348-9077
suzanne.zuidema@co.hennepin.mn.us



URBAN PARTNERSHIPS FOR WELFARE REFORM



OAKLAND

Venus Garth

Branch Chief
California Department of Social Services
Employment Services Branch
744 P Street
Sacramento, CA 95814
(P) 916- 657-3442
venus.garth@dss.ca.gov

Bruce Kern

Director
Economic Development
Alliance for Business
1221 Oak Street, Suite 535
Oakland, CA 94612
(P) 510-272-3832
bkern@co.alameda.ca.us

Paul Leonard

Director
Department of Workforce and Human Services
Social Services Agency
24100 Amador Street, 8th Fl.
HAYWARD, CA 94544
(P) 510- 259-3812
pleonard@co.alameda.ca.us

Brendan Leung*

New Initiative/Neighborhood Coordinator
Department of Workforce and Human Services
Alameda County Social Services Agency
24100 Amador Street, 6th Fl.
Hayward, CA 94544-1203
(P) 510-259-3813
(F) 510-259-3810
bleung@co.alameda.ca.us

Maurice Lim Miller

Director
Oakland Family Independence Initiative
1212 Broadway, Suite 300
Oakland, CA 94612
(P) 510-333-1065
maurice-miller@sbcglobal.net

Marsha Murrington

Sr. Deputy Director
The Unity Council
1900 Fruitvale Street
Oakland, CA 94612
(P) 510-353-6913
mgm@unitycouncil.org

Tse-Ming Tam

Division Director
Income, Assets and Jobs Division
National Economic and Law Center
2201 Broadway, Suite 815
Oakland, CA 94612
(P) 510-251-2600 ext. 110
tseming@nedlc.org

Andrea Youngdahl

Director
California Department of Human Services
150 Frank H. Ogawa Plaza, Suite 4340
Oakland, CA 94612
(P) 510-238-6112
ayoungdahl@oaklandnet.com



URBAN PARTNERSHIPS FOR WELFARE REFORM



OMAHA

Patricia Bergman

Office of Economic and Family Support
PO Box 95044
Lincoln, NE 68509-5044
(P) 402-471-2738
(F) 402-471-9597
trish.bergman@hhss.state.ne.us

Sharyn Crawford-Jones

Goodwill Industries
1111 South 41st Street
Omaha, NE 68105
(P) 402-231-1974
(F) 402-341-3061
scjones@goodwillomaha.com

John G. Daniel

GBTUSA
Father Flanagans Boys Home
Boys Town, NE 68101
(P) 402-498-1978
(F) 402-498-3261
jdaniel@boystown.org

Tim Koehn*

Nebraska Health and Human Services System
1050 N Street
Lincoln, NE 68508
(P) 402-471-5390
(F) 402-471-5144
tim.koehn@hhss.state.ne.us

Chris Rodgers

Mayor's Office
1819 Farnam Street
Suite 300
Omaha, NE 68182-0300
(P) 402-444-5151
(F) 402-444-6059
croddgers@ci.omaha.ne.us

Joel Rogers

Nebraska Health and Human Services System
1215 South 42nd Street
Omaha, NE 68105
(P) 402-595-3780
(F) 402-535-3325
joel.rogers@hhss.state.ne.us

Jim Swoopes

First National Bank
1620 Dodge Street
Omaha, NE 68102
(P) 402-633-3942
(F) 402-633-3939
jswoopes@fnni.com

Maria Vazquez

Greater Omaha Workforce Development
2421 North 24 Street
Omaha, NE 68110-2216
(P) 402-444-3449
(F) 402-444-3755
mvazquez@ci.omaha.ne.us



URBAN PARTNERSHIPS FOR WELFARE REFORM



SEATTLE

Marla Brown

WorkFirst Supervisor
Employment Security Department
1700 East Cherry Street
Seattle, WA 98122
(P) 206-568-5532
(F) 206-720-3383
mbrown@esd.wa.gov

Helen Campbell

Community Service Office Administrator
Department of Social and Health Services
Community Services Division
3600 South Graham Street
Seattle, WA 98121
(P) 206-760-2333
(F) 206-760-2345
campbhm@dshs.wa.gov

Sandy Clark

Strategic Initiatives Manager
Workforce Development Council of
Seattle/King County
2003 Western Avenue, Suite 250
Seattle, WA 98118-3034
(P) 206-448-0474
(F) 206-448-0484
sclark@seakingwdc.org

Greta Kaas-Lent*

Regional Administrator
Department of Social and Health Services
Region 4, Community Services Division
400 Mercer Street, Suite 600
Seattle, WA 98109-4641
(P) 206-272-2145
lentgf@dhs.wa.gov

Jeff Kibler

Program Supervisor
Refugee and Immigrant Section
Department of Social and Health Services
Economic Services Administration
10801 Woodley Avenue South
Seattle, WA 98178-3148
(P) 360-413-3212
kiblersea@attbi.com



URBAN PARTNERSHIPS FOR WELFARE REFORM



ST. LOUIS

Sandra Cole

Assistant to the Director
Missouri Division of Family Services
St. Louis City Office
3545 Lindell Boulevard
St. Louis, MO 63103
(P) 314-340-5506
(F) 314-340-5071
scole01@mail.state.mo.us

Maggie Hourd-Bryant*

Chief Operating Officer
Area Resources for Community and Human
Services (ARCHS)
4236 Lindell Boulevard
Suite #400
St. Louis, MO 63108
(P) 314-534-0022
(F) 314-534-0091
hourd-bryantm@stlarchs.org

Tom Jones

Executive Director
St. Louis Agency on Training and Employment
1017 Olive Street
St. Louis, MO 63101
(P) 314-589-8101
(F) 314-641-8440
tjones@slate.works.state.mo.us

Betty Marver

Associate Executive Director
Grace Hill Settlement House
1139 Olive
St. Louis, MO 63101
(P) 314-421-8420
(F) 314-539-9600
bm@gracehill.org

Jim Moore

Director
Workforce Partners
4811 Delmar
St. Louis, MO 63108
(P) 314-361-4598
(F) 314-877-0931
mooredj@accessus.net

***Acting Team Leader while at Academy**



Urban Partnerships for Welfare Reform



Federal Participants

GARY ALLEN

Teams Administrator
Administration for Children and Families
Region VII
Department of Health and Human Services
Federal Office Building
601 East 12th Street, Room 276
Kansas City, MO 64106
(P) 816-426-3981
(F) 816-426-2888
gallen@acf.hhs.gov

LOIS BELL

Division Director
State and Territory TANF Management
Office of Family Assistance
Administration for Children and Families
Department of Health and Human Services
370 L'Enfant Promenade, SW
5th Floor
Washington, DC 20447
(P) 202-401-9317
(F) 202-205-5887
lbell@acf.hhs.gov

BRENDA BENESCH

Policy Analyst
Office for the Assistant Secretary for Planning
and Evaluation
Department of Health and Human Services
200 Independence Avenue, Room 450G
Washington, DC 20201
(P) 202-260-0382
(F) 202-690-8252
brenda.benesch@hhs.gov

RAY BISHOP

Director
State and Tribal Programs
Administration for Children and Families
Region VI
Department of Health and Human Services
1301 Young Street, Room 945
Dallas, TX 75202-4348
(P) 214-767-8849
(F) 214-767-8890
rbishop@acf.hhs.gov

LARRY BRENDL

Program Manager
TANF/Child Care
Administration for Children and Families
Region VI
Department of Health and Human Services
1301 Young Street 9th Floor
Dallas, TX 75202-4348
(P) 214-767-6236
(F) 214-767-8890
lbrendel@acf.hhs.gov

CHARLOTTE BRISTOW

Program Specialist
Administration for Children and Families
Region VI
Department of Health and Human Services
1301 Young Street, 9th Floor
Dallas, TX 75202-4348
(P) 214-767-0164
(F) 214-767-8890
cbristow@acf.hhs.gov

ANDREW BUSH

Director
Office of Family Assistance
Administration for Children and Families
Department of Health and Human Services
370 L'Enfant Promenade, SW
5th Floor
Washington, DC 20447
(P) 202-401-9275
(F) 202-205-5887
abush@acf.hhs.gov

CLARENCE CARTER

Director
Office of Community Services
Administration for Children and Families
Department of Health and Human Services
370 L'Enfant Promenade, SW
5th Floor
Washington, DC 20447
(P) 202-401-9333
(F) 202-205-5887
clcarter@acf.hhs.gov



Urban Partnerships for Welfare Reform

**ANITA CARWILE**

Wage and Investment Division
Internal Revenue Service
401 West Peachtree Street
Stop 50-WI
Atlanta, GA 30308
(P) 404-338-8825
anita.carwile@irs.gov

GRANT COLLINS

Chief of Staff
Office Family Assistance
Administration for Children and Families
Department of Health and Human Services
370 L'Enfant Promenade, SW
6th Floor
Washington, DC 20447
(P) 202-401-6953
(F) 202-205-5887
grcollins@acf.hhs.gov

AL FLEMING

Family Assistance Program Specialist
Division of TA & Training
Office of Family Assistance
Administration for Children and Families
Department of Health and Human Services
370 L'Enfant Promenade, SW
5th Floor
Washington, DC 20447
(P) 202-401-4977
(F) 202-205-5887
afleming@acf.hhs.gov

JAMES GATZ

Project Specialist
Office of Community Services
Administration for Children and Families
Department of Health and Human Services
370 L'Enfant Promenade, SW
5th Floor
Washington, DC 20447
(P) 202-401-5284
(F) 202-401-5718
jgatz@acf.hhs.gov

GWENDOLYN JONES

Program Specialist
Administration for Children and Families
Region VI
Department of Health and Human Services
1301 Young Street
9th Floor
Dallas, TX 75202-4348
(P) 214-767-3849
(F) 214-767-8890
gjones@acf.hhs.gov

LEON MCCOWAN

Hub Director
Administration for Children and Families
Department of Health and Human Services
1301 Young Street
Room 914
Dallas, TX 75202-3448
(P) 214-767-9648
(F) 214-767-3743
lmccowan@acf.dhhs.gov

CAROLYN MEIER

Associate Regional Administrator
Administrative and Technology
Administration for Children and Families
Department of Health and Human Services
1301 Young Street
9th Floor
Dallas, TX 75202-4348
(P) 214-767-9648
(F) 214-767-8890
cmeier@acf.hhs.gov

DAIL MOORE

Welfare-to-Work Officer
Office of Child Support Enforcement
Administration for Children and Families
Department of Health and Human Services
370 L'Enfant Promenade, SW
4th Floor
Washington, DC 20447
(P) 202-401-3438
(F) 202-401-5461
dmoore@acf.hhs.gov



Urban Partnerships for Welfare Reform



MYLES SCHLANK

Office of Child Support Enforcement
370 L'Enfant Promenade, SW
4th Floor
Washington, DC 20447
(P) 202-401-9329
(F) 202-205-4342
mschlank@acf.hhs.gov

BETTY SIMMONS

Deputy Regional Administrator
Administration for Children and Families
Region VI
Department of Health and Human Services
1301 Young Street, 9th Floor
Dallas, TX 75202-4348
(P) 214-767-3849
(F) 214-767-8890
bsimmons@acf.hhs.gov

LISA WASHINGTON-THOMAS

Family Assistance Program Specialist
Division of TA & Training
Administration for Children and Families
370 L'Enfant Promenade, SW
5th Floor
Washington, DC 20447
(P) 202-401-5141
(F) 202-205-5887
lwashington@acf.hhs.gov

DON WINSTEAD

Deputy Assistant Secretary for
Planning and Evaluation
Department of Health and Human Services
200 Independence Avenue
404E.2
Washington, DC 20201
(P) 202-690-7409
don.winstead@hhs.gov



URBAN PARTNERSHIPS FOR WELFARE REFORM



Resource Personnel

MATT FAVIER

America's Family Inc.
3625 Betty Drive
Colorado Springs, CO 80917
(P) 719-440-2594
(F) 719-638-2074
matt@amfol.com

MARK HOOVER

President
Hoover Consulting
4-74 48th Avenue #1A
Long Island City, New York 11109
(P) 718-391-0925
(F) 718-391-0940
mshandkah@aol.com

MARY MALLORY

Associate Executive Director
Connectinc.
Work Central Career Advancement Center
1621 Eastern Avenue
Rocky Mount, NC 27801
(P) 252-442-7015
(F) 252-984-3073
mary.mallory@connectinc.org

WILLIAM NORTH

America's Family Inc.
3625 Betty Drive
Colorado Springs, CO 80917
(P) 719-440-2594
(F) 719-638-2074
william@amfol.com

KRAG REINERTSON

Business Development Executive
Enterprise Solution Group
GTSI
3901 Stonecroft Boulevard
Chantilly, VA 20151
(P) 703-502-2804
(F) 703-222-5218
krag.reinertson@gtsi.com

Jackie Savage

President
Connectinc.
1621 Eastern Avenue
Rocky Mount, NC 27801
(P) 252-984-3467
(F) 252-984-3073

HARRY SHAUGHNESSY

Technology Officer
Connectinc.
1621 Eastern Avenue
Rocky Mount, NC 27801
(P) 919-554-1919 ext. 440
(F) 919-554-8329
harrys@relevantautomation.com

RICHARD STEVENS

Partner Manager
Cognos Corporation
1595 Spring Hill Road
Suite 110
Vienna, VA 22182
(P) 703-288-2141
(F) 703-288-2111
rich.stevens@cognos.com

JASON TURNER

Director
Center for Self-Sufficiency
PO Box 11762
Milwaukee, WI 53211
(P) 414-964-5729
(F) 414-962-6671
rustication@yahoo.com

MARGARET WARREN

Director
Wage & Investment Division
Internal Revenue Service
401 W. Peachtree St.
Atlanta, GA 30308
(P) 404-338-7149
(F) 404-338-9037
margaret.l.warren@irs.gov



URBAN PARTNERSHIPS FOR WELFARE REFORM



ACADEMY SPEAKERS

LOIS BELL

Division Director
State and Territory TANF Management
Office of Family Assistance
Administration for Children and Families
Department of Health and Human Services
370 L'Enfant Promenade, SW
5th Floor
Washington, DC 20447
(P) 202-401-9317
(F) 202-205-5887
lbell@acf.hhs.gov

BRENDA BENESCH

Policy Analyst
Office of the Assistant Secretary for Planning
and Evaluation
Department of Health and Human Services
200 Independence Avenue, SW
Room 447D
Washington, DC 20201
(P) 202-260-0382
(F) 202-690-8252
bbenesch@osaspe.hhs.gov

STEVE BIGARI

President and CEO
America's Family Inc.
3625 Betty Drive
Colorado Springs, CO 80917
(P) 719-638-2071
(F) 719-638-2074

ANDREW BUSH

Director
Office of Family Assistance
Administration for Children and Families
Department of Health and Human Services
370 L'Enfant Promenade, SW
5th Floor East
Washington, DC 20447
(P) 202-401-9275
(F) 202-205-5887
abush@acf.hhs.gov

CLARENCE CARTER

Director
Office of Community Services
Administration for Children and Families
Department of Health and Human Services
370 L'Enfant Promenade, SW
5th Floor
Washington, DC 20447
(P) 202-401-9333
(F) 202-205-5887
clcarter@acf.hhs.gov

ANITA CARWILE

Wage and Investment Division
Internal Revenue Service
401 West Peachtree Street
Stop 50-WI
Atlanta, GA 30308
(P) 404-338-8825
anita.carwile@irs.gov

GRANT COLLINS

Chief of Staff
Office of Family Assistance
Administration for Children and Families
Department of Health and Human Services
370 L'Enfant Promenade, SW
6th Floor
Washington, DC 20447
(P) 202-401-6953
(F) 202-205-5887
grcollins@acf.hhs.gov

JOYCE DORSEY

Executive Director
Fulton Atlanta Community Action Authority
151 Ponce De Leon Avenue, N.E.
Atlanta, GA 30308
Phone: (404) 320-0166 or (404) 320-8397
faca@aol.com



URBAN PARTNERSHIPS FOR WELFARE REFORM

**STEVEN DOW**

Executive Director
The Community Action Project of Tulsa County
717 South Houston, Suite 302
Tulsa, OK 74127
(P) 918-382-3200
(F) 918-382-3213
sdow@captc.org

AL FLEMING

Family Assistance Program Specialist
Division of TA & Training
Office of Family Assistance
Administration for Children and Families
Department of Health and Human Services
370 L'Enfant Promenade, SW
5th Floor
Washington, DC 20447
(P) 202-401-4977
afleming@acf.hhs.gov

JIM GATZ

Project Specialist
Office of Community Services
Administration for Children and Families
Department of Health and Human Services
370 L'Enfant Promenade, SW
5th Floor East
Washington, DC 20447
(P) 202-401-5284
(F) 202-401-5718
jgatz@acf.hhs.gov

LEON MCCOWAN

Regional Administrator- ACF Region IV
Department of Health and Human Services
1301 Young Street
Room 914
Dallas, TX 75202
(P) 214-767-9648
(F) 214-767-3743
lmccowan@acf.hhs.gov

OVETTA SAMPSON

Public Relations Manager
America's Family Inc.
3625 Betty Drive
Colorado Springs, CO 80917
(P) 719-440-2594
(F) 719-638-2074
ovetta@amfol.com

KAREN SHAWCROSS

Senior Vice President and National Program
Manager
Bank of America's National Incentives
Bank of America OR1-129-07-59
121 S.W. Morrison Street
Portland, OR 97204
(P) 503-279-2876
(F) 503-275-2438
karen.b.shawcross@bankofamerica.com

LISA WASHINGTON-THOMAS

Family Assistance Program Specialist
Division of TA & Training
Administration for Children and Families
370 L'Enfant Promenade, SW
5th Floor
Washington, DC 20447
(P) 202-401-5141
lwashington@acf.hhs.gov

DON WINSTEAD

Deputy Assistant Secretary for Planning and
Evaluation
Department of Health and Human Services
200 Independence Avenue
Room 404E.2
Washington, DC 20201
(P) 202-690-7409
(F) 202-690-8252
don.winstead@hhs.gov



URBAN PARTNERSHIPS FOR WELFARE REFORM



ACADEMY FACILITATORS

GARY ALLEN

Administration for Children and Families
Region VII
Federal Office Building
601 East 12th Street, Room 276
Kansas City, MO 64106
(P) 816-426-3981
(F) 816-426-2888
gallen@acf.hhs.gov

CHARLOTTE BRISTOW

Program Specialist
Administration for Children and Families
Region VI
1301 Young Street, 9th Floor
Dallas, TX 75202-4348
(P) 214-767-0164
(F) 214-767-8890
cbristow@acf.hhs.gov

AL FLEMING

Family Assistance Program Specialist
Division of TA & Training
Office of Family Assistance
370 L'Enfant Promenade, SW
5th Floor
Washington, DC 20447
(P) 202-401-4977
(F) 202-205-5887
afleming@acf.hhs.gov

JEANETTE HERCIK

Senior Associate
Caliber Associates
10530 Rosehaven Street, Suite 400
Fairfax, VA 22030
(P) 703-385-3200
(F) 703-385-3206
hercikj@calib.com

COURTNEY KAKUSKA

Associate
Caliber Associates
10530 Rosehaven Street, Suite 400
Fairfax, VA 22030
(P) 703-385-3200
(F) 703-385-3206
kakuskac@calib.com

KAREN LYNN-DYSON

Senior Associate
Caliber Associates
10530 Rosehaven Street, Suite 400
Fairfax, VA 22030
(P) 703-385-3200
(F) 703-385-3206
dysonk@calib.com

FREDDIE JOHN MARTIN

Senior Associate
Caliber Associates
10530 Rosehaven Street, Suite 400
Fairfax, VA 22030
(P) 703-385-3200
(F) 703-385-3206
martinf@calib.com

KENT PETERSON

Caliber Associates
3500 Rainbow Drive, Suite 207
Kansas City, KS 66103
(P) 913-432-0585
(F) 913-432-0586
kentjpeterson@aol.com

MYLES SCHLANK

Office of Child Support Enforcement
370 L'Enfant Promenade, SW
4th Floor
Washington, DC 20447
(P) 202-401-9329
(F) 202-205-4342
mschlank@acf.hhs.gov

LISA WASHINGTON-THOMAS

Family Assistance Program Specialist
Division of TA & Training
Administration for Children and Families
370 L'Enfant Promenade, SW
5th Floor
Washington, DC 20447
(P) 202-401-5141
(F) 202-205-5887
lwashington@acf.hhs.gov



URBAN PARTNERSHIPS FOR WELFARE REFORM



Contract Staff

KELLY CARNAHAN

Administrative Associate
Caliber Associates
10530 Rosehaven Street, Suite 400
Fairfax, VA 22030
(P) 703-385-3200
(F) 703-385-3206
carnahak@calib.com

LESLIE FAIN

Caliber Associates
10530 Rosehaven Street, Suite 400
Fairfax, VA 22030
(P) 703-385-3200
(F) 703-385-3206
leslifain@aol.com

BRADLEY MYLES

Research Assistant
Caliber Associates
10530 Rosehaven Street, Suite 400
Fairfax, VA 22030
(P) 703-385-3200
(F) 703-385-3206
mylesb@calib.com

APPENDIX C:
EVALUATION SUMMARY

APPENDIX C: EVALUATION SUMMARY

To assess how well the Academy met participants' needs, Academy attendees were given an evaluation that asked various open-ended questions. This appendix includes a list of the evaluation questions, general response themes, and selected individual responses.

A. Describe what was most useful about the Academy. Please describe both immediate benefits and anticipated long-term benefits.

The majority of comments for this question fall into three main themes:

1. City-to-city interaction, networking, and dialogue

Overwhelmingly, most Academy participants listed this theme as the most useful aspect about the Academy. Examples of common responses include:

“The opportunity to dialogue with other cities.”

“Learning about the promising and best practices of sister-cities.”

“Networking with and meeting peers from other cities.”

2. Information Exchange through Various Presentations

Academy participants repeatedly mentioned certain presentations as being the most informative and helpful for them. These Academy sessions include:

“The America's Family presentation by Steve Bigari.”

“The Annie E. Casey Foundation presentation by Dr. Ira Barbell.”

“The Demonstration of a Local Case Management Tool by ConnectInc.”

3. The Opportunity to hear the latest information from the Federal partners

Through their responses, it was evident that many Academy participants appreciated the opportunity to receive presentations from various Federal partners from the Office of Family Assistance, the Office of Community Services, and the Office of the Assistant Secretary for Planning and Evaluation. Examples of comments include:

“Hearing from the Federal Partners about what's next.”

“Information about new requirements and the future of TANF reauthorization.”

“To hear about the President's new plan.”

B. What issues or topic areas would you like to have had greater discussion about during this Academy?

Responses to this question did not fall quite as neatly into concise themes. However, many comments did fall into broad categories, such as:

1. Desire for Elaboration of Topics Discussed at the Academy

Issues or topics in this category included responses such as:

“More about the new 24/16 requirement.”

“More about asset-mapping.”

“More dialogue on resource development.”

“More dialogue on engaging employers.”

“More about each city's best practices in more depth; what their various strategies are; what works/what doesn't.”

“More about reauthorization and the new budget requirements.”

2. Topics that were Not Discussed at the Academy

In this category of responses, Academy participants suggested new issues or topics that they wished had been included in the Academy agenda such as:

“Teen pregnancy.”

“Systems integration.”

“Section 8 and other subsidized housing through HUD.”

“Marketing development.”

“Effective collaboration techniques.”

“How to effectively establish and monitor contract entities.”

“How to maximize TANF dollars.”

3. Suggestions About the Academy Structure or Agenda

Academy participants raised concerns with the structure of the Academy and the Academy agenda. Their comments included:

“Each city-team should have been given more time to present so that the other cities could learn more in-depth information.”

“There should have been more discussion lead by the participating cities.”

“There should have been more team sharing time to discuss best practices together.”

“Needing more time to network with other cities.”

C. How will the information you received at this Academy assist you in moving forward with welfare reform efforts in your state/community? How has the Academy helped you to refine your goals for follow-up technical assistance?

To answer this question, most participants responded in one of two ways: they either listed what next steps they would take as a result of the *content* of the Academy or they described what they learned from the *process* of the Academy.

1. Next Steps Due to *Content* of the Academy:

Examples of comments included:

“Will re-look at our business processes now that we know how others do things with TANF clients.”

“Several 'employer engagement' models provided ideas for further review.”

“Information on asset-mapping is great; will incorporate into our program design.”

“First, it has added resources (or identified possibilities) and given us contacts; plus, the exercises (particularly of asset-mapping) have helped us think of specific adjustments for upgrading our local partnership.”

“The information has provided additional supports for our city's team to engage broader participation.”

2. Points of Learning from the *Process* of the Academy:

Typical comments included:

“Networking with other cities gave the opportunity to meet and obtain best practices that can be used.”

“It has allowed our team to build in order to develop our objectives; good for having time with our team members.”

“Establishing good relations with colleagues.”

“Recognition from the Academy and the technical assistance lends credibility to the local group.”

D. Additional Comments about the Academy in general

This question provided Academy participants a chance to offer open-ended, undirected comments about any aspect of the Academy. These comments reflected themes, such as:

1. The Agenda and Academy Sessions

Comments included both complimentary remarks and constructive criticisms such as:

“The asset-mapping exercise was useful.”

“The Federal Partnerships and DHHS did a great job adjusting the agenda of the last day based on cities' feedback!”

“Too many presentations and not enough time to interact.”

“Cities had too little time to talk about their programs, strengths, and challenges.”

“Cities had little input in the creation of the agenda.”

2. Comments About the Hotel Accommodations

These Academy participants used this open-ended question to comment on the hotel accommodations with varying responses such as:

“The room where most of our sessions were held was too small and crowded.”

“The hotel rooms were very nice.”

“Wonderful facility and great food.”

3. Suggestions for the Future

For these Academy participants, this question was an opportunity to reiterate or emphasize a suggestion for the future of the Urban Partnerships Initiative, such as:

“Please issue a summary report to each participant.”

“Please seriously consider bringing back to the cities with another Academy where the cities assist in creating more of the agenda and the cities get more time to talk to each other.”

Would like to see a follow-up conference in 6 months dealing with specifics and more interaction.”

The next three open-ended evaluation questions focused specifically on each of the three days of the Academy. In chronological order, this section of the report summarizes evaluation comments about these three days.

E. Please provide any additional comments about the sessions offered on the first day of the Academy in the space below.

Comments about Day 1 of the Academy fell into two main themes:

1. Constructive Criticism about the Schedule of the Day

Because Day 1 was a travel day for many participants, comments indicated a general consensus of discontent about the full schedule of the day. Common responses include:

“Schedule was too full for a travel day.”

“We should have been never asked to work until 9pm on a Sunday evening, especially when most of us spent the entire day travelling.”

“Too much packed into this day and went way too late; need to be aware of how travel logistics influence a late evening session.”

2. Comments about the Keynote Address

Other comments pertained to the Federal presenters who introduced and framed the Academy on Day 1. These include:

“Presentations by Andy Bush and Don Winstead were insightful.”

“The information on Federal objectives will help in future planning in our local area.”

F. Please provide any additional comments about the sessions offered on the second day of the Academy in the space below.

Day 2 was the only full day of the Academy and hence the longest on the agenda with many various presentations and sessions. Comments about this day pertain either to a specific presentation or the day as a whole.

1. Comments About Specific Presentations

These participants used this opportunity to comment on a specific presentation of Day 2. Some frequently-occurring comments include:

“America's Family-one of the best sessions.”

“During the Engaging Employers session, Karen and Denise gave fantastic information.”

“The panel moderated by Mr. Carter was not engaging because it did not provide enough new content.”

2. Comments About the Day as a Whole

These comments generally focused on the length of the day or the allocation of time on the agenda. Responses were generally negative, while some constructively suggested ideas for improvement. Common responses include:

“The day was extremely long and caused information burn-out; too much in one day.”

“More time should have been allotted for the City Profile presentations and for the sharing of best practices. These presentations were too rushed and were hard to digest as a result.”

“Agenda was too full; no opportunity to reflect on information heard with team members; maybe there should have been more unscheduled personal time during the day for participants and for team interaction.”

G. Please provide any additional comments about the sessions offered on the third day of the Academy in the space below.

Comments regarding Day 3 of the Academy collapse into two main areas. These responses include:

1. Comments About the Agenda

Day 3 was a half-day of Academy sessions but offered more flexibility in the agenda. Comments indicated a positive response to this flexibility. Common responses include:

“The agenda flexibility to allow teams time to regroup was great.”

“Thank you for being flexible with the agenda for this day. The ability to talk to several cities around key issues was quite beneficial.”

“The slow down to allow networking was an improvement. This is the way the Academy should have been.”

2. Responses to the Case Management Software Demonstration

This Software Demonstration elicited a wide variety of comments. Comments ranged in content and were both negative and positive.

Positive responses include:

“The case management software is really beneficial.”

“Impressive technology.”

Negative responses include:

“There was a frustration with the computerized case management presentation; while the model looked good, cities have little to no funding to support this.”

“Management tool demonstration not appropriate for this Academy; felt like a commercial or an infomercial.”

“Already have high quality MIS resources; not a great need for this; could have been a specific break-out session for only the teams that needed it.”