Collaboration Institute

Participant Guidebook

Better Outcomes Through Collaboration:
An Institute for Managers of Temporary Assistance for Needy Families, Child Support, and Workforce Investment

U.S. Department of Health and Human Services
Administration for Children and Families
Office of Family Assistance

U.S. Department of Health and Human Services
Administration for Children and Families
Office of Child Support Enforcement

U.S. Department of Labor
Employment and Training Administration

Collaboration Institute
AGENDA

Arlington, Virginia
Marriott Crystal City
September 15-17, 2008

MONDAY, SEPTEMBER 15, 2008

3:00 -6:00 PM **REGISTRATION AND CHECK-IN**

6:00 – 7:30 PM **WELCOMING RECEPTION**
MONTICELLO BALLROOM SALON A

Speakers: **Robin McDonald**, Office of Family Assistance, U.S. Department of Health and Human Services
Dail Moore, Office of Child Support Enforcement, U.S. Department of Health and Human Services
Christine Ollis, Employment and Training Administration, U.S. Department of Labor

TUESDAY, SEPTEMBER 16, 2008

7:30 – 8:00 AM **REGISTRATION**

8:00 - 8:30 AM **OPENING AND WELCOMING REMARKS**
POTOMAC SALON D/E

Speakers: **Sidonie Squier**, Director, Office of Family Assistance, U.S. Department of Health and Human Services
Margot Bean, Commissioner, Office of Child Support Enforcement, U.S. Department of Health and Human Services
Gay Gilbert, Administrator, Office of Workforce Investment, Employment and Training Administration, U.S. Department of Labor

Moderator: **Lisa Washington-Thomas**, Office of Family Assistance, U.S. Department of Health and Human Services

In this session, participants will be provided with an overview of the work that the three agencies have been doing on the Federal level to partner in new ways.

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8:30 – 9:30 AM **OVERVIEW OF THE COLLABORATION INSTITUTE AND TEAM INTRODUCTIONS (MODULE 1)**
POTOMAC SALON D/E

During this session, participants will be provided an overview of the goals and objectives of the Collaboration Institute. There will be a brief introduction to the curriculum modules and they will meet their team's facilitators and note takers. Each team will have a few moments to introduce themselves in an interactive icebreaker exercise.

Speakers: **Team Representatives**

Moderator: **Kent Peterson, ICF International**

9:30 – 9:45 AM **BREAK**

9:45 – 10:45 AM **AGENCY UPDATE AND LEVEL SETTING (MODULE 1)**
POTOMAC SALON D/E

During this interactive session, representatives from each of the three Federal agencies will outline key legislative, policy, and programmatic changes that have taken place, which have implications for their other partners. Each panel member will speak for about ten minutes with a follow-up of 30 minutes for Q&A from the audience.

Speakers: **Eileen Brooks,** Office of Child Support Enforcement
Lisa Washington-Thomas, Office of Family Assistance
Gay Gilbert, Employment and Training Administration

Moderator: Kent Peterson, ICF International

10:45 AM – 12:00 PM **TEAM TIME #1: "ROAD MAPPING" WHERE WE ARE (MODULE 2)**
POTOMAC SALON D/E AND BOARDROOM

Each team will work with their facilitators to reflect on the information provided, better understand the status of their team's "collaboration index," and chart out what each agency is looking to get out of the different modules.
During this time each team will be provided with their TANF/WIA/CSE Partnership Profile.

Moderators: Team Facilitators

12:00– 1:30 PM **LUNCH ON YOUR OWN**

1:30 – 2:30 PM **WHERE WE CAN GO (MODULE 3)**
POTOMAC SALON D/E

This session will provide a brief overview of the benefits to families and systems as a result of cross-agency collaboration. This will be a facilitated interactive session highlighting some promising practices underway within the teams invited to the Institute showcasing not simply what they are doing, but "how" they moved forward. Minneapolis and San Antonio will be the lead participant-discussants starting off the discussion.

Speakers: **Team Representatives**

Moderator: **Kent Peterson, ICF International**

2:30 - 3:45 PM **TEAM TIME #2: WHERE WE CAN GO (MODULE 3)**
POTOMAC SALON D/E AND BOARDROOM

During this time, each team will chart out the customers, activities, funding, and performance metrics for their specific programs. Teams will discuss key challenges, successes, and ideas around developing and implementing collaborative efforts. Each team will discuss overlap in their clientele and ways to improve service delivery. This session will allow participants to engage in peer-to-peer dialogue around their opportunities to work together from information sharing, cross-agency projects, policy development and systems changes. Facilitators will work with Teams to envision the areas where clients, activities, funding, and performance overlap.

Moderators: **Team Facilitators**

3:45-4:00 PM **BREAK**

4:00-5:00 PM **WHERE WE CAN GO (MODULE 3)**
POTOMAC SALON D/E

During this session each agency team will share its key findings with the group and lay the foundation for interagency communication and collaboration. Together, the group will better understands the linkages between the three agencies and the elements within them.

Moderator: **Kent Peterson, ICF International**

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WEDNESDAY, SEPTEMBER 17, 2008

8:00 - 8:30 AM **MORNING WELCOME**
POTOMAC SALON D/E

REVIEW DAY ONE AND REENERGIZE FOR DAY TWO

Moderator: Kent Peterson, ICF International

8:30 - 9:30AM **TEAM TIME #3: PRIORITIZING PARTNERSHIP DESTINATIONS (Module 4)**
POTOMAC SALON D/E AND BOARDROOM

Teams will work through a very interactive prioritization process to improve services to customers and increase program efficiencies through collaboration. This will be the first phase of the Action Planning that the team will do for improving collaboration based on shared values, shared objectives, and shared outcomes.

Moderators: Team Facilitators

9:30-9:45 AM **BREAK**

9:45 - 11:00 AM **TEAM TIME #4: A NEW DESTINATION (MODULE 5)**
POTOMAC SALON D/E AND BOARDROOM

Facilitator will work with Teams to capture all work and thoughts into an action plan. Session allows for each team to select a viable course of collaboration, which will improve services to customers and allow for program efficiencies. Each team will develop their action plan, including roles and responsibilities of team members when they "go back home" to ensure that they "stay the course" of collaboration. The teams will prepare for their Team Time Report Out. Facilitators will work with Teams to capture thoughts and incorporate changes into the action plans.

Moderators: Team Facilitators

11:00 AM - 1:00 PM

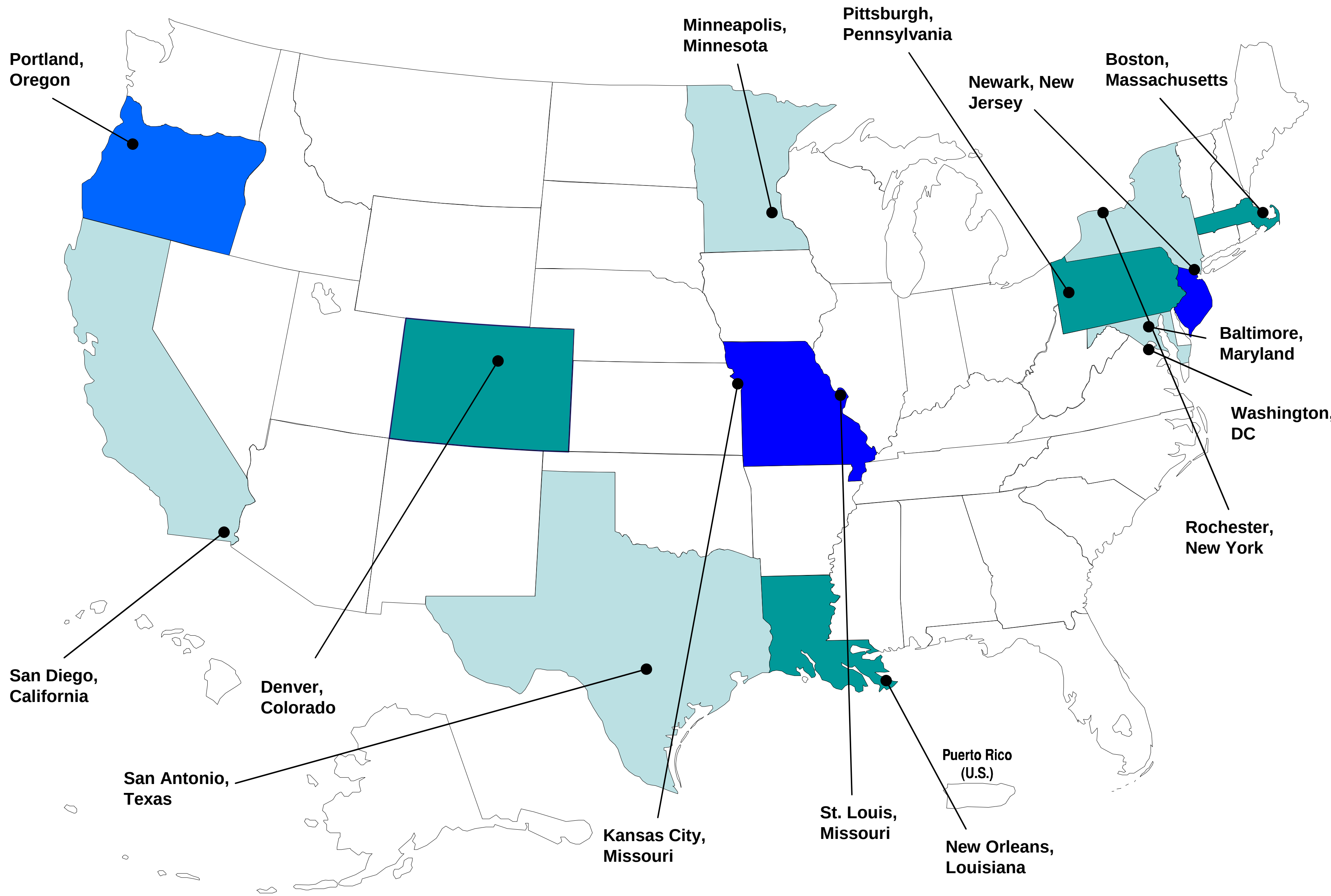
REPORT OUTS AND NEXT STEPS & WRAP-UP
POTOMAC SALON D/E

In this general session, each team will share their strategic action plan and team time report focusing on the identified common goals and ways to improve service delivery. Each team will provide a brief presentation regarding what they have achieved, what challenges they anticipate facing, their ideas to remedy such challenges, and ongoing support they may need from their Federal, State, and local partners going forward.

Speakers: **Paul Maiers**, Office of Family Assistance
Dail Moore, Office of Child Support Enforcement
Christine Ollis, Office of Workforce Investment

Federal partners will give closing remarks.

Moderator: Kent Peterson, ICF International



Collaboration Institute Sites

2008 Collaboration Institute

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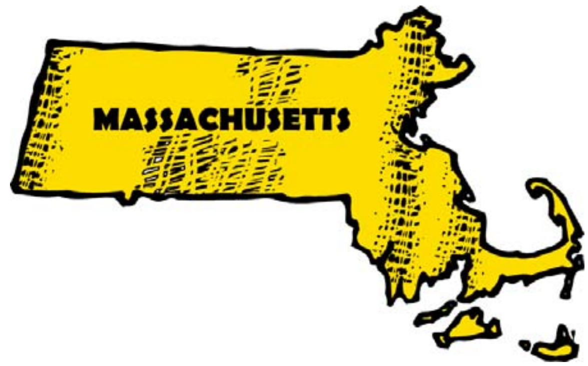

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U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES
OFFICE OF FAMILY ASSISTANCE

PAUL MAIERS has worked at the U.S. Department of Health and Human Services, Administration for Children and Families (ACF) since 1991and has been involved in a wide range of technical assistance projects that promote family self sufficiency and child well being. Mr. Maiers has managed several grants, contracts, and other projects that have assisted states and communities in implementing their TANF programs, as well as various welfare reform stakeholders. During his tenure in the Office of Family Assistance, he has participated in several high level ACF initiatives in areas related to work policies, self-sufficiency strategies, family formation, marriage, and family strengthening. Prior to working on TANF, Mr. Maiers was a Family Assistance Specialist helping states implement their JOBS (Job Opportunities and Basic Skills) Programs, which was the predecessor to the TANF Program. Prior to working at the Department of Health and Human Services, Mr. Maiers worked at the U.S. Treasury Department, U.S. Coast Guard, and Navy Department. Mr. Maiers was also on active duty in the U.S. Navy for four years.

ROBIN Y. MCDONALD, ESQ., is the Director of the State and Territory TANF Management Division within the Office of Family Assistance (OFA). The OFA is the operating division that administers the Temporary Assistance for Needy Families (TANF) program within the Department of Health and Humans Services' Administration for Children and Families. As Division Director, Ms. McDonald oversees the planning and provision of technical assistance to help States and Territories implement new requirements authorized under the Deficit Reduction Act of 2005 (DRA) which are designed to expand upon successful efforts to move families toward self-sufficiency. Ms. McDonald's responsibilities also include implementation and oversight of the $150 million Healthy Marriage and Promoting Responsible Fatherhood demonstration grants authorized by the DRA.

Immediately prior to her position with OFA, Ms. McDonald served as the Community-Based Abstinence Education's (CBAE) Management and Program Analyst with the Administration for Children and Families' Family Youth Services Bureau. Her primary responsibilities included oversight of government contract negotiation, monitoring legislative and legal compliance by State and discretionary grant recipients, and developing recommendations for proposed regulatory changes.

From 2002 – 2005, McDonald served as a Special Assistant to the Secretary of the U.S. Department of Labor's Center for Faith-Based and Community Initiatives—part of President George W. Bush's national faith-based and community initiative. Ms. McDonald's primary responsibilities included development and implementation of a national ex-offender employment demonstration project called *Ready4Work*. The project served as a foundation for the Administration's $300 million Prisoner Re-Entry Initiative announced in the January 2004 State of the Union address.

For the past fifteen years, Ms. McDonald has enjoyed a broad career in the nonprofit community, as well as in the Legislative and Executive Branches of the Federal government. She completed her undergraduate work in Mass Communications/Speech and Broadcasting from Anderson University in Anderson, Indiana, and earned a *Juris Doctor* degree from the George Mason University School of Law in Arlington, Virginia. Ms. McDonald is an attorney, a member of the Maryland State Bar, and resides in Arlington, Virginia.

SIDONIE SQUIER, MA, is the Director of the Office of Family Assistance, Administration for Children and Families (ACF), US Department of Health and Human Services, where she administers the Temporary Assistance for Needy Families (TANF) program, the Nation's principal welfare assistance program. She joined ACF in June 2005. Ms. Squier has served in various welfare administration and policy positions – most recently as the Federal Liaison on human service issues for the State of Texas. Previously, she worked in Austin, Texas, administering TANF, food stamp, and Medicaid eligibility programs as well as special nutrition, refugee, and domestic violence programs. While in Austin, she served on the American Public Human Services Association steering committee for TANF and the Texas County Advisory Workgroup on Healthy Families, which focused on healthy marriage. Prior to that, Ms. Squier was the Director for the State of Florida and the Economic Self-Sufficiency and Welfare Reform Administrator. She has also worked in Michigan and California in health and human services policy and communications roles. Ms. Squier graduated from California State University at Long Beach with both a B.A. and an M.A. in Communications.

LISA WASHINGTON-THOMAS is Branch Chief of the Division of Self-Sufficiency in the Office of Family Assistance, Administration for Children and Families. She has experience in a wide array of social services programs, such as TANF, AFDC, Job Opportunities and Basic Skills, Emergency Assistance Group, the Rapid Response to Technical Assistance Contract, Healthy Marriage Resource Center, and Community Planning Grants. Ms. Washington-Thomas earned a B.A. from Georgetown University.

U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES OFFICE OF CHILD SUPPORT ENFORCEMENT

MARGOT BEAN was appointed Commissioner for the Federal Office of Child Support Enforcement (OCSE) effective July 25, 2005. Margot leads an office whose primary mission is to serve children and families by assuring that assistance in obtaining financial and medical support is available to children through locating parents, establishing paternity and support obligations and enforcing those obligations.

Prior to becoming Commissioner of OCSE, Margot served the New York State Division of Child Support Enforcement (DCSE) as a senior policy advisor from 1998 until being appointed Deputy Commissioner and Director in 2000. Under her leadership, child support collections in the state reached record levels.

Before joining the DCSE, Ms. Bean was Director of the Guam Office of Child Support Enforcement within the Guam Attorney General's Office. She began her career in the Guam Attorney General's Office in 1980 and served as an Assistant Attorney General in several divisions, including the Prosecution, Civil Litigation, and Family Divisions.

Ms. Bean was delegate to the Hague Conference from its second session where she participated as an official in the NCSEA delegation. In the last several sessions she was the lead of the United States official delegation and signed the convention on behalf of the U.S. government.

Ms. Bean is an attorney licensed in New York and Guam, and is a graduate of Lewis & Clark Northwestern School of Law and William Smith College. She is a former President of the National Child Support Enforcement Association.

EILEEN BROOKS is Director of the Division of State, Tribal and Local Assistance in the Federal Office of Child Support Enforcement in Washington, DC. This Division administers OCSE's Special Improvement Project (SIP) grants, Section 1115 grants, Healthy Marriage Initiative waivers, and the Access and Visitation grant program. It also promotes program development and performance improvement by providing technical assistance and training; developing materials and resources for the child support community; and leading collaboration initiatives with other programs and with the courts. A major Division activity is the annual National Child Support Enforcement Training Conference in Washington, DC. Ms. Brooks has a B.A. in political science from the University of Michigan, Ann Arbor, and an M.A. in public administration from American University, Washington, DC.

DAIL MOORE is the Director of the National Technical Assistance and Training Center in the federal Office of Child Support Enforcement (OCSE). He served as Technical Assistance Chief for OCSE from 2003 - 2004. Dail was OCSE's Welfare-to-Work Officer from 2000 to 2003 and served in other areas of federal child support and TANF. Prior to joining USDHHS, he was Director of the Office of Employment Training for the City of Alexandria, Virginia, and served in other employment training capacities for the city for 15 years. Dail completed the Harvard Institute for Employment and Training Administration and received his B.A. from the University of Virginia.

U.S. DEPARTMENT OF LABOR
EMPLOYMENT AND TRAINING ADMINISTRATION

GAY GILBERT joined the U.S. Department of Labor, Employment and Training Administration in November 2000 and currently serves as the Administrator of the Office of Workforce Investment. In that role, she provides federal oversight and leadership for America's workforce investment system, including employment and training programs under the Workforce Investment Act, and direction and support for the nation's locally driven one-stop delivery system. A key focus for her office is promoting increased collaboration among the workforce system, business and industry, and education partners at all levels to develop innovative workforce solutions to ensure the nation's workers have the critical skills they need to succeed and businesses have access to the talent they need to grow and prosper – both of which are key to American competitiveness in the global economy.

Prior to joining the U.S Department of Labor, Mr. Gilbert was a senior official for the State of Ohio overseeing workforce programs for over ten years. Mr. Gilbert also served as Assistant City Attorney for the City of Columbus, Ohio in the area of public employment law for two years and eight years with the West Virginia Department of Human Services.

She received her Bachelor of Arts from Michigan State University, a Master of Social Work from West Virginia University, and a Juris Doctor from Ohio State University

CHRISTINE OLLIS is the Chief of the Adult Services Division, Office of Workforce Investment, Employment and Training (ETA), U. S. Department of Labor (DOL). The Division includes the Workforce Investment Act's Adult and Dislocated Worker programs, Wagner Peyser funded programs, Older Worker programs, American Indian and Alaska Native programs, and Migrant and Seasonal Farmworker programs, the Disability Program Navigator Initiative, Career Advancement Account demonstration projects, and the Community Based Job Training Grant initiative. Prior to taking this position in November 2005, Ms. Ollis was the Division Chief for the One-Stop Operations Division at ETA. Ms. Ollis has held a variety of positions in ETA since joining DOL in 1998. She was the Deputy Administrator in the Office of Financial and Administrative Management. She was the team leader for the Performance Accountability team, Deputy Director of the Office of Grants and Contract Management, team leader in the Youth Office, and the former Deputy Director of the National School-to-Work Office. Ms. Ollis began her federal career in the Office of Vocational and Adult Education as Chief of Staff. Prior to that, she ran her own workforce/education focused consulting business and worked for the National Association of Counties. She began her workforce career running a CETA program in Central New York.

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2008 Collaboration Institute

Arlington, Virginia
Marriott Crystal City
September 15-17, 2008

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Collaboration Institute
September 15-17, 2008
Marriot Crystal City- Arlington, Virginia

Background

Collaboration across federal, state, and local agencies is essential in order to provide the full range of services and support the neediest populations to help them successfully navigate education, training, and career pathways leading to improved, sustainable employment and self sufficiency.

Overview of the Collaboration Institute

The Office of Family Assistance (OFA) and the Office of Child Support Enforcement (OCSE) of the Administration for Children and Families, U.S. Department of Health and Human Services; and the Employment and Training Administration, U.S. Department of Labor are partnering to hold a two day Collaboration Institute in Arlington, Virginia on September 15-17th, 2008.

The Collaboration Institute is a facilitated two day event designed to bring together teams from medium-sized urban areas across the United States to strengthen their collaboration between three partners representing senior level managers from TANF, Child Support Enforcement, and Workforce Development agencies. The Institute will provide a hands-on intensive opportunity for teams to engage in facilitated strategic planning and culminate in the development of an action plan to be implemented upon teams' return to their jurisdictions.

Pre and Post Institute

Prior to the Institute, teams will participate in a Webinar that will provide information on the Institute and provide a chance for medium-sized urban area teams to engage in peer-to-peer dialogue with representatives of the Federal Agency team and other medium-sized urban area teams. Teams will also receive post-Institute products that will synthesize the lessons learned from the Institute.

Institute Outcomes

Teams will be provided with:

- Resources and tools to utilize in encouraging and increasing collaboration between State and local TANF, Workforce Development, and Child Support Enforcement agencies;
- Peer-to-peer dialogue on key issues in child support and workforce development that impact TANF participants; and
- The opportunity to develop action plans to address the challenges of meeting the needs of three agencies in increasing work participation rates.

MODULE 1:

A: Overview of the Collaboration Institute

&

B: Agency Update and Level Setting

Tuesday, September 16, 2008

8:30 AM – 10:45 AM Sessions

Session #1
Tuesday: September 16, 2008 8:30 AM – 9:30 AM

Module 1A: Collaboration Institute Overview

Purpose: During this plenary session, participants will be provided an overview of the goals and objectives of the Collaboration Institute, including a brief introduction to the five curriculum modules and how they build off one another. They will meet their team's facilitators and note takers. During an interactive introductory session, the team members will meet one another.

Goals and Objectives: Each team will be introduced to each other and they will understand the purpose of the Collaboration Institute and their roles and responsibilities in participating in this effort.

Activities: There will be a brief presentation on the Collaboration Institute, the agenda and how the Collaboration Institute will unfold. At close of the Overview session, there will be an interactive exercise to identify your goals and expectations of the Institute (Activity 1) and an opportunity to discuss current collaborative efforts (Activity 2).

Overview of the Collaboration Institute

- Three Federal agencies partnered to develop this Institute.
- The child support, Temporary Assistance for Needy Families, and workforce investment programs have undergone considerable change—some legislative and some programmatic shifts.
- There are potential benefits to all three programs and their clients if there is collaboration across the three systems.
- Collaboration can improve client service, decrease costs, and increase opportunities for improved service.
- Despite potential challenges, collaboration can pave the way to new and better ways of delivering services to America's most vulnerable populations.

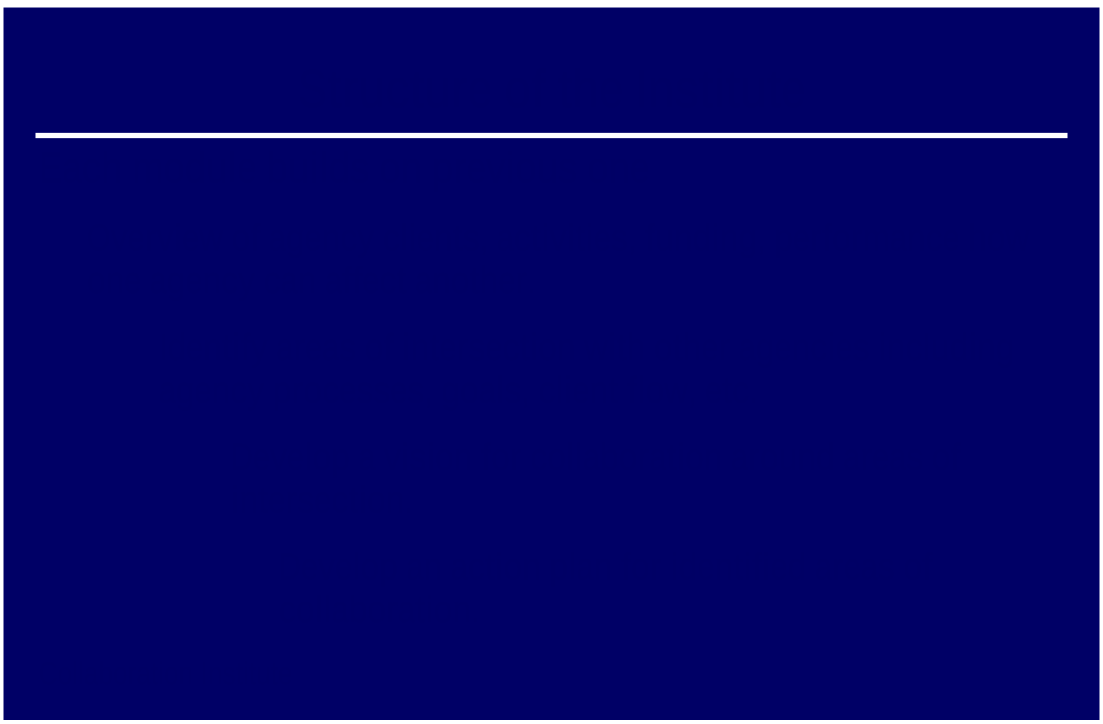
Goals and Objectives of Collaboration Institute

- The Institute is designed for managers from child support, Temporary Assistance for Needy Families, and workforce investment from the same geographical area of a state.
- The Institute aims to help agencies improve program and client outcomes through collaboration.
- The goal of the Institute is the development of an action plan for each jurisdiction.
- The curriculum developed for the Institute is comprised of five modules, each of which builds on the previous one.

Structure of the Institute

- Some modules have large-group brainstorming activities. Most activities, however, occur in small-group discussions with an Institute facilitator providing assistance. Small groups will make reports to the larger group.
- The Institute *is not* lecture style.
- Rather, it is interactive, requires active participant engagement, and builds on participants' knowledge and experiences to identify potential areas of increased collaboration. Figure 1-1 represents the structure of the Institute.

Figure 1-1.



Overview of the Module Objectives

Module 1: Overview and Agency Update

Two Sessions:

- **A: Overview of Institute and Goals of Objectives**
    - Addresses the overall structure of the Institute.
    - Outlines remaining modules.
- **B: Agency Update and Level Setting**
    - Highlights legislation that authorizes the child support, TANF, and workforce investment programs.
    - Provides overview of policy and programmatic changes that have taken place within each program.
    - Outlines benefits of collaboration.

Module 2: Road Mapping-Where We Are

- **Use of the TANF/WIA/CSE Partnership Profile to Understand Baseline**
- **Team Time #1**
    - Interactive Discussion.
    - Building Common Understanding.

Module 3: Where We Can Go

- **Plenary Session**
    - Overview of benefits to families and systems as a result of cross-agency collaboration.
    - Snapshots of promising practices of collaboration.
    - Focus on "How" collaborative efforts are moving forward.
- **Team Time #2**
    - Interactive Activities to chart clients, activities, funding and performance metrics.
    - Peer-to-peer Dialogue.
- **Report Outs**

Module 4: Prioritizing Partnership Destinations

- Interactive Exercise.
- Prioritize efforts to improve services to families and increase program efficiencies.
- Begin Action Planning based Module 1: Overview of Institute and Agency Update and Level Setting.

Module 5: A New Destination

- Select Course of Action.
- Identify Roles and Responsibilities of Team Members.
- Prepare Action Plan—Report Out.

Identifying Current Collaborative Efforts

Activity 1

Now, think about your experiences in the world outside of your work. Take 10 minutes to write down two examples of corporate and public sector collaborations, partnerships, mergers, product integration, etc., that was intended to improve program efficiency or provide a positive impact on clients. Be prepared to share your observations with the large group as you introduce team members.

Examples of partnerships, mergers or collaboration that integrate products and/or services	Impact on Efficiency?	Impact on Client?
Corporate/Private Sector: 1. 2. 3.		
Public/Non-Profit Sector: 1. 2. 3.		

Expectations of Institute

Activity 1

This activity will gauge your expectations of the Institute and map them with the training modules. Over the next 10 minutes, review the expectations for each module with your facilitator and identify any questions, concerns, or special information needs you may have. Make certain that your questions are addressed and that you have a clear understanding of your wants and needs and how the sessions respond to them.

	You can expect to hear or create…	What are your expectations and goals?
Module 1	A simple framework for understanding the potential of collaboration to improve efficiency and effectiveness across your specific agencies.	
Module 2	A shared definition about the current level and effectiveness of partnership across your agencies.	
Module 3	A complex chart of the intersections that exist between agencies today in the areas of clients, activities, funding, and performance measures.	
Module 4	Specific, prioritized examples of collaborative working relationships that each team can build or enhance.	
Module 5	A plan of action for engaging staff and others in building a more successful collaborative partnership.	

Session #2

Tuesday: September 16, 2008 9:45 AM – 10:45 AM

Module 1B: Agency Update and Level Setting

Purpose: During this plenary session, a panel of Federal speakers representing each agency—Office of Family Assistance, Office of Child Support Enforcement, and the Employment and Training Administration—will provide a legislative, policy, and programmatic update to the participants.

Goals and Objectives: Each team will better understand the different Federal programs and the potential for policy and program implications for the program that they represent. This agency update will allow for "level setting" in getting all of the participants to have a greater understanding of their partners' programs, and ready them for more effective collaborative discussions.

Activities: There will be a brief panel presentation (10 minutes per agency), followed with an interactive Question and Answer period for approximately 30 minutes.

Introduction to Key Issues

- **Overview of the Three Agencies Programs and Legislation**
- *U.S. Department of Health and Human Services—Administration for Children and Families*
    - Office of Family Assistance
    - Office of Child Support Enforcement
- **U.S. Department of Labor—Employment and Training Administration**

ACF-Office of Family Assistance

- **The Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA)**
    - 1996—Temporary Assistance for Needy Families (TANF) Program Established.
        - Time Limits.
        - Work Participation Rates.
    - Purposes of TANF.
        - Provide assistance to needy families.
        - End dependency by promoting job preparation, work, and marriage.
        - Prevent and reduce the incidence of out-of-wedlock pregnancies.
        - Encourage the formation of two-parent families.

ACF-Office of Family Assistance (continued)

- **The Deficit Reduction Act (DRA) of 2005**
  - Placed increased emphasis on work participation and self-sufficiency.
  - Increased focus on marriage and fatherhood.
    - 100 Million in grant dollars for Healthy Marriage Grantees.
    - 50 Million in grant dollars for Responsible Fatherhood Grantees.
  - Federally defined work activities.
  - Caseload Reduction Credit.
    - Based on 2005 numbers rather than 1995 rates.
    - 50 percent of all families participating in prescribed work activities.
  - Provide official guidance to States no later than 2006 to ensure consistent measures of work rates.
- **June 2006—HHS adopted definitions of the work activities**
  - Instituted significant new requirements related to state monitoring of participants' participation in work activities.
  - Recalibrated the Caseload Reduction Credit.
    - Making work participation critical.
    - Increasing importance of placing clients into employment.
- **Flexibility to design welfare-to-work programs**
  - Making broader use of vocational educational training.
  - Developing creative ways to combine education and training with other countable work activities.
  - Utilizing effective subsidized employment strategies.
  - Improving work experience and job search programs.

ACF—Office of Child Support Enforcement

- **Passed in 1998, the Child Support Performance and Incentive Act (CSPIA)**
  - Aims to promote family self-sufficiency and child well-being by tying incentive payments to five performance measures.
    - Paternity Establishment.
    - Child support order establishment.

- Collections on current support due.
- Collections on past-due support (i.e., arrears).
- Cost-effectiveness.

DOL—Employment and Training Administration

- **The 1998 Workforce Investment Act (WIA)**
  - Created different levels of services at One-Stop centers.
    - Core services, include intake, orientation, skills assessment, job search and placement counseling, labor market information, and support services information.
    - Intensive services are available for unemployed individuals who are unable to obtain jobs through core services and those who are employed but need additional services to reach self-sufficiency. These include in-depth assessment, counseling, case management, and in some instances short-term pre-vocational services. Eligibly for intensive services is determined at the local level.
    - Training services, including financial assistance through Individual Training Accounts, may be available for those who meet intensive services eligibility, but who were unable to secure employment after receiving those services.
  - Performance measures tracked under WIA are entered employment, employment retention, and average earnings.

Workforce System Services

- **One-Stop Career Centers in the workforce investment system serve job seekers and employer customers**
  - Adult and dislocated workers who are unemployed or underemployed and seek education, training, and employment.
  - Includes career planning, resume writing, how to deal with the loss of a job, and obtaining skills and education.
  - Employers receive comprehensive services through One-Stop Career Centers—including recruitment and screening, customized training, retention, and up-skilling services.
- **One-Stop Career Centers are a source of employment services for low income individuals**
  - Including those individuals coming off TANF.
  - Non-custodial parents affiliated with child support and/or TANF families.

Why Collaborate Across Systems

- TANF participants must cooperate with child support; if they do not, their cash grants are reduced at least 25 percent.
- TANF participants must assign to the state the rights to all current child support collected on their behalf to be eligible for assistance.
- Child support serves custodial parents and their children, as well as non-custodial parents.
  - Nationally, total distributed child support collections amounted to almost $25 billion in FY 2007—a 3.8 percent increase over 2006.
- Child support is a critical source of income for TANF families.
  - DRA of 2005 includes incentives for states to increase the amount of child support that is "passed through" to families on welfare.
- According to a 2008 report, issues such as data reliability, the TANF 5-year maximum, and data sharing necessitated a higher level of collaboration and collaboration routinely involves strategies and methods that facilitate interaction between program staff at the State or local level, or interaction between the case worker and participant.
- DRA established increased accountability measures for States that places more emphasis on meeting work participation rates.
  - Increased importance of helping TANF participants find work quickly and retain employment.
- One-Stop Career Centers represent a key component of meeting client needs and help to reduce some of the barriers faced by TANF participants.
- One-Stop Career Centers often find ways to coordinate the services provided by multiple programs, creating a seamless approach to delivering services.

Opportunities to Improve Collaboration

- According to the General Accounting Office (GAO), nearly all states reported some coordination at the state or local level.
  - Informal linkages (such as information sharing or periodic program referrals).
  - Formal linkages (such as memorandums of understanding).
  - Shared intake, or integrated case management.
  - Coordination of TANF-related services with One-Stop Career Centers increased from 2000 to 2001.
    - Collocation of services, electronic linkages or client referral—was based, in part, on the type of services provided—TANF work services, TANF cash assistance, or support services—as well as state and local preferences and conditions.

    - The level of coordination between TANF and One-Stop Career Centers was different depending on the particular program services that were provided.

- Recalibrated the Caseload Reduction Credit.
  - Makes work participation critical and increasingly important to place clients into employment opportunities.
  - Strengthens the need for increased collaboration and linkage between workforce sites and TANF administrators.

MODULE 2:

"Road Mapping"

Where We Are

Tuesday, September 16, 2008

10:45 AM – 12:00 PM

Session #3
Tuesday: September 16, 2008 10:45 AM – 12:00 PM

Module 2A: Road Mapping

Purpose: Participants will come to a shared understanding about the current nature and level of collaboration among and between the three agencies (TANF, WIA, CSE) in their city or region. Participants will be able to discuss, in general, why improving services to low-income families goes beyond the scope of any one agency.

Activities: During this facilitated break out, agency groups will begin by exploring collaboration as a developmental process that logically builds from meeting to share information to joint projects and significant practice changes.

When working to take the collaborative journey, it is critical that each agency have a clear understanding of where their relationships with others are today as well as the specific "collaborative" efforts already underway. Each of the cities or regions represented brings existing relationships and collaborative experience to the Institute. Clearing outlining the current status of collaborative efforts, individual organizational interest and shared desire to improve collaboration or partnering will serve as the backdrop for developing an action-plan with members from other agencies.

There are **four levels of collaboration** that are useful in understanding the growth of high performing collaboratives:

- Sharing Information
- Joint Projects
- Changing Rules
- Changing Systems

TABLE 2-1 LEVEL AND EXAMPLES OF COLLABORATION

Level 1	Level 2	Level 3	Level 4
Share information about programs available to families.	**Staff from your agencies work on projects together to improve each other's services.**	**We have changed some rules in the community for serving families.**	**We have changed the "system" of services that affect or support families in our community.**
Meet with cross-service provider staff routinely to share information, produce a newsletter or brief about the needs and services available to families, information and referral efforts in the city for families, etc.	Received a grant that supports multiple agencies individual work, improved outreach awareness efforts together, etc.	Targeted families are first-in-line for services, staff from service providers are co-located, hours or locations of services have changed to be more convenient, etc.	Significant funding has been redirected, staff from separate agencies are cross-trained, governing bodies of organizations have adopted policy changes, etc.

URBAN AREA TEAM TIME

Activity 1

This Team discussion helps clarify and build a common understanding about the current level and effectiveness of partnerships across your agencies. Teams will have about 40-minutes for this discussion followed by selected report outs to the large group.

Using your Team's **Collaborative Profile** (handed out on-site) as a starting parting point, work with your colleagues to craft a summary of your partnership skills, experiences, and expectations to date.

Each team member should verbally share her/his perception about the current level of collaboration among and between the agencies. Together, the Team should answer and be prepared to present:

- At what level do we currently collaborate?
- What has already been accomplished through connecting with each other?
- In general, what potential is there to achieve better outcomes or increased efficiency through collaborating at a deeper level?

MODULE 3:

Where We Can Go

Tuesday, September 16, 2008

1:30 PM – 5:00 PM

Session #4
Tuesday: September 16, 2008 1:30 PM – 2:30 PM

Module 3A: Where We Can Go

Purpose: This session will provide a brief overview of the benefits of cross-agency collaboration to families and systems. It will highlight some promising practices from within the teams represented at the Institute and will focus on current courses of action and how they moved forward.

Goals and Objectives: Participants will learn about the benefits of cross-agency collaboration and have an opportunity to learn from two programs that have successfully coordinated services across their child support, Temporary Assistance for Needy Families, and workforce investment programs. From these examples, participants will be able to begin identifying opportunities for collaboration within their own programs.

Activities: This will be a plenary session that highlights two sites – Minneapolis and San Antonio. Teams will then be provided with an opportunity to share their successes or challenges in collaboration with other teams. Teams will be pulled into the dialogue using the "summary points" from their previous work session.

Key Discussion Points:

- Examples of leveraging child support, Temporary Assistance for Needy Families, and workforce investment clients, activities, funding, or performance measures in a way that improves efficiency or effectiveness.
- Factors or circumstances that promote or inhibit collaboration.

Teams will then break into smaller groups to discuss team specific collaborations and how to proceed.

Session #5
Tuesday: September 16, 2008 2:30 PM – 3:45 PM

Module 3B: Where We Can Go

Purpose: This interactive session will provide teams an opportunity to map out clients, activities, funding, and performance measures for their individual programs. Each team will discuss successes and challenges, as well as brainstorm new ideas, around developing and implementing collaborative efforts. Teams will identify service delivery overlap between and among each of their programs in an effort to improve service delivery.

Goals and Objectives: Participants will engage in peer-to-peer dialogue to discuss cross-program relationships that will improve service delivery. Participants will have an open exchange of ideas to identify opportunities for collaboration from information sharing, cross-agency projects, policy development, and systems change. Teams will be focusing on areas where clients, activities, funding, and performance measures overlap.

Activities: We will break in to teams and each participant will take 10-minutes to chart descriptions of each of their respective agencies. Each team member will then provide a presentation and discuss their charts with the team (5-7 minutes each). Following the overview presentations the team will identify connections among and between the three charts.

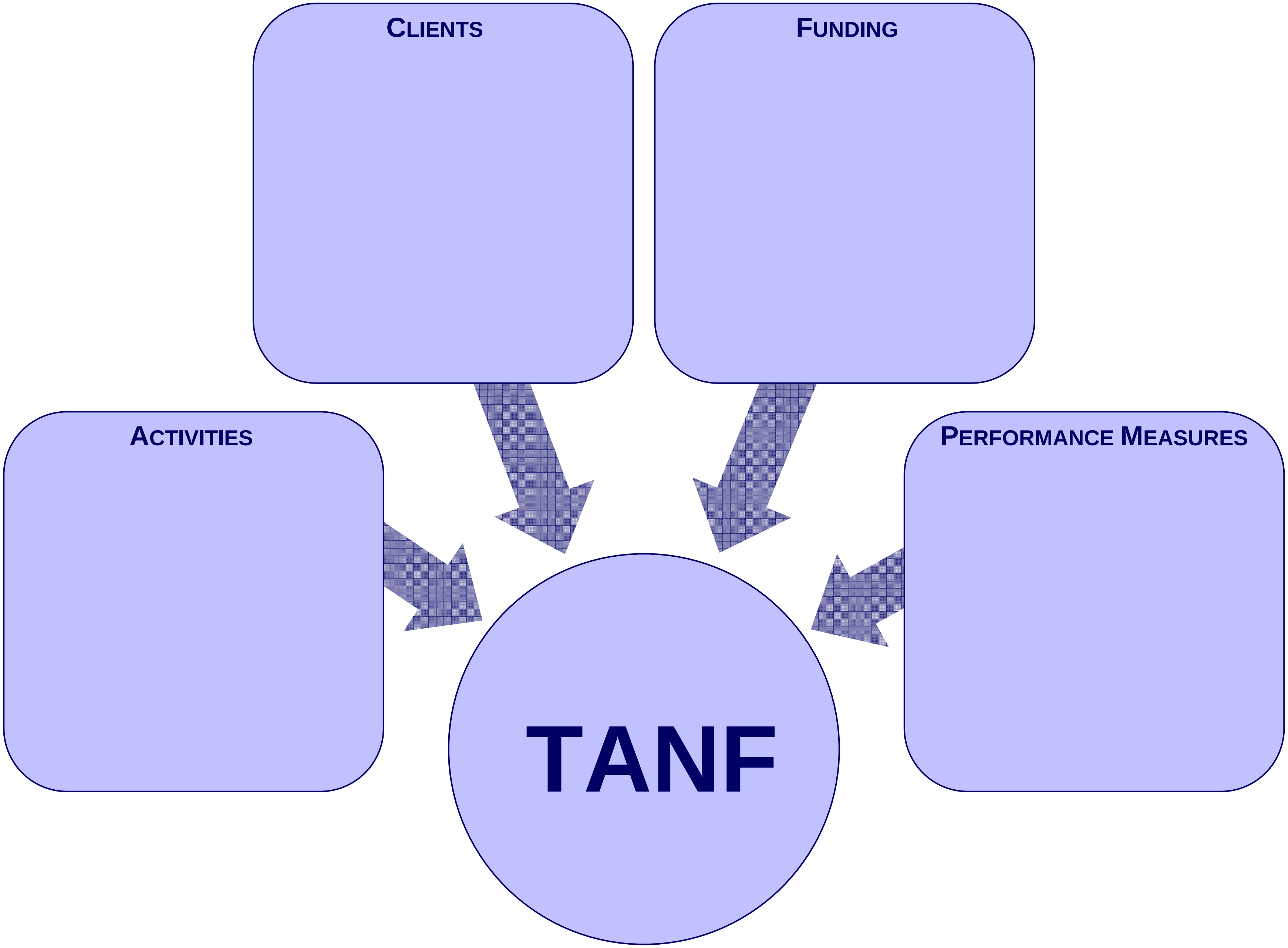
Agency Descriptions

Activity 1

Break in to teams. Each participant will take 10-minutes to chart high-level descriptions of the following for each of their respective agencies:

- Agency clients;
- Primary agency activities or functions;
- Primary funding sources; and
- Key performance measures.

The charts are on the following three pages.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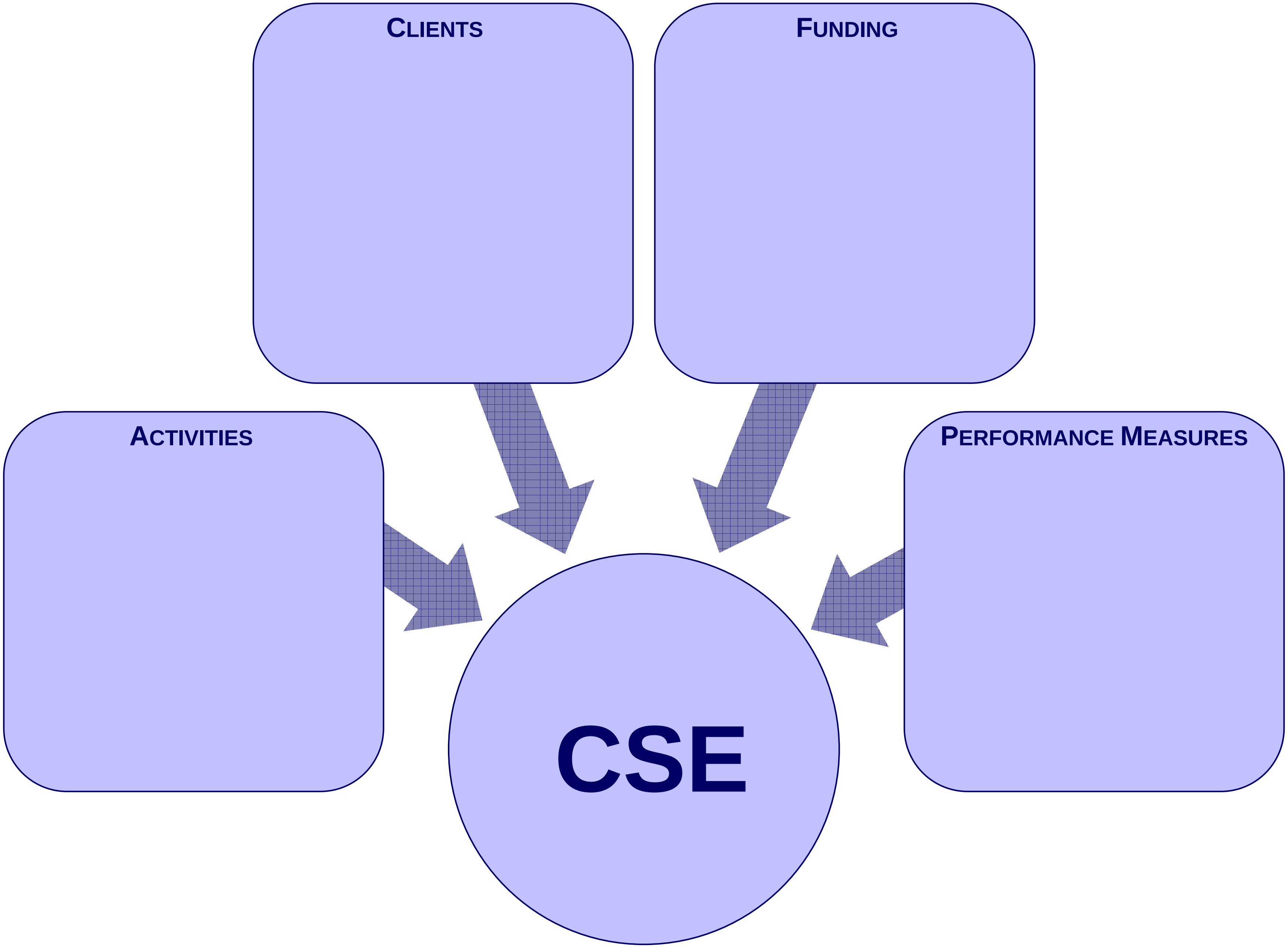
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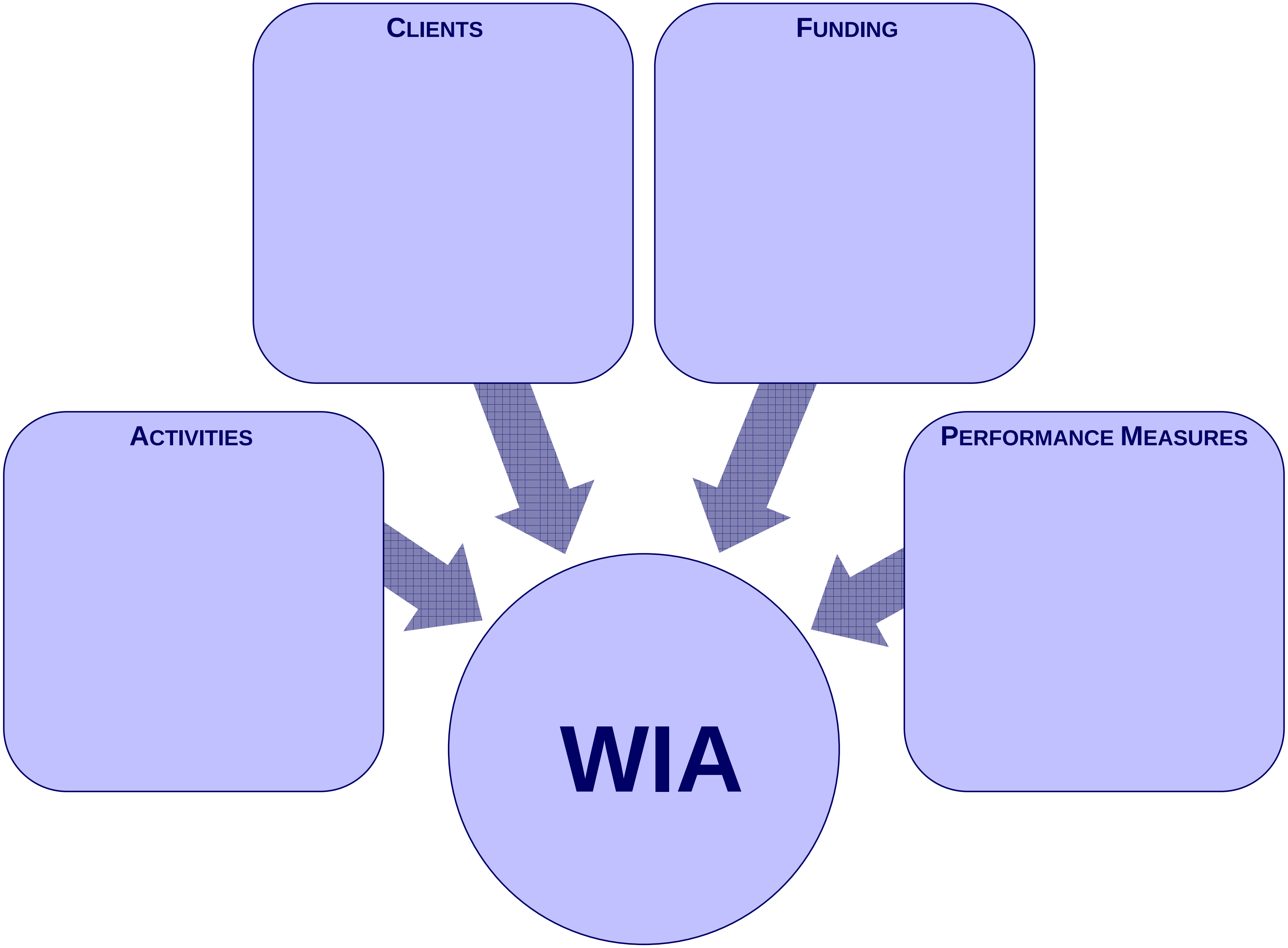
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ACTIVITIES
PERFORMANCE MEASURES
WIA

Making Connections

Activity 2

The team will identify connections among and between the three charts. Using string and adhesive tape or markers, the team members will connect ideas on the three charts using the following key. (30 minutes)

- Green Lines – shared or common interests
- Red Lines – area of competition or where we may work at cross purposes

Analysis and Synthesis (15 minutes)

The team will examine the "web of possible connections" and answer the following questions. The team should also place an X in the appropriate boxes in the table to represent their perception about the value of partnering in the future.

- What observations do we have about shared or common interests?

- What observations do we have about competition or cross purposes?

What is the likelihood of finding opportunities for increased efficiency or improving the experience and outcomes for clients?

	Low	Medium	High
Improving Operational Efficiencies			
Improving the Client Experience or Outcomes			

Please be prepared to share your analysis and synthesis with the large group.

Session #6
Tuesday: September 16, 2008 4:00 PM – 5:00 PM

Module 3C: Where We Can Go

Purpose: Participants will share key findings from their team discussions which will serve as a stepping stone for identifying tangible efforts of collaboration across agencies.

Goals and Objectives: Through large group reporting, teams will learn about additional opportunities for collaboration and will better understand the linkages between the three agencies and the functions and services of each.

Activities: All participants will reconvene in one assembly. Facilitated discussion will identify key findings by agency in an effort to more easily identify similarities within agencies' services and other opportunities for interagency collaboration.

MODULE 4:

Prioritizing Partnership Destinations

Wednesday, September 17, 2008

8:30 AM – 9:30 AM

Session #7
Wednesday: September 17, 2008 8:30 AM – 9:30 AM

Module 4: Prioritizing Partnership Destinations

Purpose: During this interactive session, teams will have an opportunity to prioritize their ideas for interagency collaboration. Teams will be prioritizing opportunities to work in partnership to improve services and increase program efficiencies.

Goals and Objectives: Teams will prioritize service collaboration ideas in an effort to begin the initial stages of developing an action plan that will be used for improving collaboration based on shared values, objectives, and outcomes.

Activities: After examining the team's "Where can we go?" chart the participants will work together to identify collaborative opportunities to improve experiences or outcomes for clients and to improve their own efficiency by working together. Once these opportunities have been identified, teams will then prioritize their ideas.

Opportunities for Collaboration

Activity 1

List specific examples or partnerships you could improve or create in each of the four levels.

	Level 1	Level 2	Level 3	Level 4
Partnership Opportunities	Share information about programs available to families. (i.e. meet with cross-service provider staff routinely to share information, produce a newsletter or brief about the needs and services available to families, information and referral efforts in the city for families, etc.)	Staff from your agencies work on projects together to improve each other's services. (i.e. received a grant that supports multiple agencies individual work, improved outreach awareness efforts together, etc.)	We have changed some rules in the community for serving families. (i.e. targeted families are first-in-line for services, staff from service providers are co-located, hours or locations of services have changed to be more convenient, etc)	We have changed the "system" of services that affect or support families in our community. (i.e. significant funding has been redirected, staff from separate agencies are cross-trained, governing bodies of organizations have adopted policy changes, etc.)
Improving Collaboration for Clients				
Improving Collaboration for Efficiency				

Prioritization

Activity 2

You should have up to eight (8) examples of opportunities to partner in new or improved ways. Rank in order the eight (8) in the following charts.

Likely to get implemented	Will have a significant impact
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8

Examine the rankings. Discuss and decide as a team which opportunities are most reasonable to take action on in the coming year.

MODULE 5:

A New Destination

Wednesday, September 17, 2008

9:45 AM – 11:00 AM

Session #8
Wednesday: September 17, 2008 9:45 AM – 11:00 AM

Module 5: A New Destination

Purpose: Teams will use their prioritization from Module 4 to identify viable courses of action and collaboration to improve services to clients and improve program efficiencies and develop an action plan. The action plan will be used to drive collaborative efforts after the Institute.

Goals and Objectives: Teams will use the knowledge gathered throughout the Institute to form an action plan that will outline roles and responsibilities of each team member and each agency at large to ensure that collaboration and communication continues beyond the Institute. Teams will use their action plan to prepare a report out for the general assembly.

Activities: During this time, teams will review the ideas and opportunities discussed throughout the Institute and select two that seem to be both likely to be accomplished and that will have some positive impact. Teams will discuss the pre, during implementation and sustaining efforts that this increased level of collaboration will require. To the degree possible, specific roles and responsibilities should be included in the team reports.

Our Destination

Activity 1

Based on the ideas generated in the in Module 4, identify the two (2) collaborative improvements and a timeframe for implemented. You have about 50-minutes for this discussion.

	Partnership Improvement	Date Implemented By:
1		
2		

Pre-trip preparation

Who will want to go on this trip with us?

Who will want to stay behind?

What work needs to be done before we depart by partner agencies? By the State?

What kind of help will we need for a successful journey?

During the trip

How long will it take to bring this change about?

What leadership tasks will we need to take on routinely?

What communication tasks will need to be tended to?

How will we ensure staff engagement and motivation?

Your Commitments to Follow-Through

Activity 2

Given your discussion about "how" to go about improving collaboration/partnership you will prepare a presentation for the large group that includes the following questions. You have about 20-minutes to prepare.

1. What are our shared expectations/agreements for change or improvements?

2. When will the changes be apparent to clients?

3. What specific action steps will each of the Team members take in the next 30-60 days?

4. What technical assistance or help might be needed?