Office of Family Assistance
Welfare Peer Technical Assistance Network Webinar
Integrating Comprehensive Case Management Strategies into TANF Programs
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Presenters:

- **James Butler, Office of Family Assistance, Administration for Children and Families**
- **Michelle Derr, Senior Researcher, Mathematica Policy Research**
- **Mike McCaman, Deputy Director of Workforce Development, Franklin County Department of Job and Family Services, Ohio**
- **Dean Simpson, Chief of Economic and Family Services, Division of Social Services, Department of Health and Human Services, North Carolina**
- **Barbara Harris, Child Care Subsidy & Work First Program Manager, Wake County Human Services, North Carolina**
- **Lesley Smith, Welfare Peer Technical Assistance Network**

Operator: Ladies and gentlemen, thank you for standing by. Welcome to the Integrating Comprehensive Case Management Strategies into TANF Programs conference call. During the presentation, all participants will be in a listen-only mode. If at any time during the conference you need to reach an operator, please press star 0.

As a reminder, this conference is being recorded Wednesday, May 22, 2013. I would now like to turn the conference over to James Butler, Office of Family Assistance. Please go ahead.

James Butler: Hello everyone, and welcome to our webinar on integrating comprehensive case management strategies into TANF programs. This webinar is brought to you today by the Welfare Peer Technical Assistance Network, here in the Office of Family Assistance, the Administration for Children and Families.

Our plan for today's webinar is to provide you with an overview of various methods for creating an efficient and integrated approach to providing case management services with TANF populations. We will offer TANF-serving organizations information on program models and strategies that address intensive case management, service integration, and barriers to service.

We've seen an increase in the number of technical assistance requests and questions posted on the Welfare Peer TA Network related to this topic, so we thought we'd organize this webinar to be responsive to your interest.

Today you'll hear from a representative from Mathematica Policy Research, along with State and county representatives who will talk to you about specific case management strategies and key lessons they've learned throughout their practice.

At the end of the presentations, you will have the opportunity to ask questions through the WebEx platform. You can submit questions to be answered following the last presentation or throughout the webinar, by using the chat box on your computer screen. If your question is for a specific speaker or program, please specify that in your question.

As you close out of today's webinar, you will be asked to respond to a brief evaluation poll that should pop up automatically as you close out. We greatly appreciate your feedback, as it will help us to shape our delivery of technical assistance.

All of the materials from today's webinar will be posted on the Welfare Peer TA Network Web site and will be sent directly to all of you who registered on the Web site within a few weeks.

Moderating today's webinar will be Lesley Smith, who is a project manager with ICF International. I'll start out by introducing our first speaker for today, Michelle Derr, who is the senior researcher with Mathematica Policy Research. Michelle, you have the floor.

Michelle Derr: Great. Thank you for allowing me to present. I'm very excited to be here. Just a little background about myself. I'm a senior researcher at Mathematica. My training -- I have a PhD in social work. And I've been at Mathematica for almost 15 years, and over that time, I've really – my area of expertise is employment and training programs for disadvantaged populations.

And most of my work has been in the TANF area, but I've also studied programs for individuals with disabilities, older workers, ex-offenders, and other more disadvantaged populations. Over the course of my stay at Mathematica, I've been in about 100 different communities in more than half of the States, studying employment and training programs, again most of which were TANF programs.

And prior to that in my graduate school days, I interviewed about almost 600 people -- TANF recipients -- in their homes -- it was back in AFDC -- TANF recipients; it was going through a change -- learning about some of the personal and family challenges they faced in going back to work.

So I feel like I've got an area of -- I really understand not only the populations that you all are serving, but also the types of programs and strategies that you've implemented.

The other part, that just in introduction of myself, is that I'm very passionate about taking research and bringing it back to the field. I come out and I interview and learn about your programs oftentimes, and I like to bring those research findings back to you, so that you can use them to help implement and improve your programs.

So with that introduction, what I really -- in preparing my remarks, I really wanted to draw upon my experience out in the field, and again with a really deep understanding of the population you're serving.

So next slide. So I think, when I'm thinking about case management, I think you really have to understand the TANF program approach. And what we're seeing is -- because it influences the type of case management -- the types of issues that you're really trying to address.

What we're seeing is, some programs are really focused on more of a work first approach. And more recently, I've seen this kind of creating a business culture around work. So for example, I recently went to New York City, and one of the providers, instead of having case managers that typically provided those functions, they called them sales associates.

This is another program in Connecticut, and they -- again another provider. And they were hiring people because they had this strong work first, business kind of culture approach. They weren't necessarily hiring people with human services background. Instead, they were focusing people more -- people from customer service.

They had former police officers. They had some military people, people from the military, and others that were from different occupations that were a little bit different than the traditional kind of social work approach. But again, creating this culture around getting a job, helping people to get a job, and being connected to the labor force.

I think there's also other programs that are focusing on still getting a job, but also this kind of barrier removal approach, addressing some of the personal and family challenges that interfere with work. And those programs would tend to hire case managers that do have more of that social work background or more of a human services background, because the focus is more on linking clients to community services to address those barriers prior to employment.

I think another interesting kind of point that I want to make around the TANF program approach is that some programs use these specialized programs where they remove those with documented physical and mental health conditions from the caseload, and serve them in separate programs, different programs.

And in some of those programs, they actually provide services and they require people to engage in work or work-related activities. And so for example, States like Utah say we're going to tailor or require flexible hours and activities. But you're going to still perform at your maximum ability. And then some just completely exempt them from the work activities.

So for those programs, if they're going to require some type of activity, then the case manager would have some type of skill set that would be working with those with documented physical and mental health conditions to get them approved. But if they're just going to be completely exempt from those activities, then again, the skill set required for that case manager is maybe a little bit different.

I think the other important point -- and it's happened more recently, particularly since the re-authorization of -- back in the deficit with the DRA or Deficit Reduction Act -- is that some States have implemented programs that have altered the caseload composition through sanctions or up-front work requirements.

The clients who are on their caseload are either more work-ready, or they have a greater proportion of hard-to-employ, or more of a mix. But some of the policies have influenced -- and some of the work that we've done -- has influenced that caseload composition.

So again, another thing to keep in mind is what would be the characteristics of the population you're serving in terms of making decisions about your approach to case management and the types of skill sets and the types of caseload sizes and workload sizes that you might need in structuring -- in serving clients.

Next slide. I think another thing that, you know, in thinking about case management is who's the case management for? And in my experience in looking at programs and also interviewing welfare recipients, like I said, in their homes, I've learned that it's a very diverse population.

They have different levels of work-readiness. Some people can be just down on their luck and going through a job transition or a relationship transition but having kind of steady work history, and they need different types of supports than somebody who may have more long-term personal and family challenges.

They have also varying access to resources and supports; where some people may need just a little bit of support, other people may need more intensive support. I think my main point here is that case management needs to be responsive to the varying abilities and needs of the clients that they're serving.

And it's not really a one-size-fits-all approach that's going to work. It's more of a toolkit for case managers to be able to address the different needs of different individuals that they're serving.

So next slide. What is the role? Going back to really fundamentals, what is the role of the TANF case manager? What do they do? They do lots of different things.

I've listed here everything from initial and ongoing assessment. Employment service planning. Linking clients to in-house and community services. Encouraging. Motivating. Supporting engagement and keeping people engaged so that they can meet those work requirements and the program requirements.

In some cases, it's individualized soft skills training or coaching. Monitoring and verifying program participation. And then also re-engaging non-participants and initiating sanctions. Now it's important to note that programs are different and the types of activities that are case manager responsibilities, case managers are required to perform.

The one thing I really want to point out on this, and having done a lot of field work more recently, is that repeatedly I hear that monitoring and verifying program participation is consuming more than half of people's time, of case managers' time. And so they're struggling to meet the other kinds of responsibilities on their plate.

So what we're seeing is some activity around how do you reduce that level of monitoring and verifying that's required of case managers. And I can talk about that a little bit later in some of the discussion questions. But I think the important point is they're still trying to figure out how to juggle all of these different roles that they're playing.

The next slide. So what I've seen, and I'm just, I've seen lots of different approaches to case management. But I think these are some of the ones that I really want to focus on today. The first is more of a kind of a traditional individualized case management. It's what most of your programs implement, and again with varying types of roles and responsibilities assigned to the case manager.

There's also kind of a group case management model that I've seen in the past, that I think, for those of you who've been around for a long time, some of the work that Toby Herr's done around the Pathways Group Case Management model is really interesting.

But I'm starting to see that emerge again as resources are tight. How do they think about using more of a group approach to serving multiple clients at once, rather than just providing that individualized approach?

You know, when I think about the group case management model, I put in parentheses here the Weight Watchers model. There is this level of, you know, a group case management model, one way I've seen it done is that people show up. Everybody's required to show up once a week at a given time, and then they report out on their week, and they do it in a group setting.

The advantage to that approach is that there's some accountability in it. The other participants in the group hold each other accountable for showing up, for reporting out their activities. And the person has to report back what they've done.

The challenge of this is that sometimes people -- it's hard to address some of the personal and family challenges in that group model. And so you can have some of a hybrid, and also finding case managers or individuals with the ability or the skill set to kind of facilitate that group case management, because it is a little bit more tricky than just meeting with a client one on one.

Another approach that I've seen more recently is also -- and in the past -- is the use of specialized workers. And you see it on two different levels. So in some programs, you're seeing it for employment services where they specifically carve out a task, and they say for employment services you'll provide just this piece of that case management, or that responsibility.

So they may just – that person may just do the intake, the assessments and the case planning piece of it. And then somebody else will do some of the ongoing work.

Or they may split it out and triage the case in terms of, we'll send people who are work-ready to those case managers. We'll send those who may need more support to those case managers, and those who are maybe participating in education and training activities to those case managers. So they'll specialize it by the type of service needs that a client has, or the approach that is used, and particularly when they triage cases.

You also see the use of specialized workers in addressing personal and family challenges. So both California and Utah and some other programs, they actually have specialized drug or mental health workers that are in their programs, where traditional case managers can refer clients who need more support to those specialized workers.

And what it does is it allows those kind of traditional case managers a way to remove more barriers so that they can get more intensive help somewhere else, because those cases often take, consume, a considerable amount of resources. And so it just offers that additional support, and it actually allows the client to get more support that's responsive to their actual needs, than they might have with a traditional case manager.

So, next slide. I get often asked this issue of what's the ideal caseload for a case manager. And I always say it's really not about the caseload. What you really need to think about is the workload. So what are the roles and responsibilities of the worker, and what are they required to do? And then you can start to think about how many cases would be appropriate, given what their roles and responsibilities are.

So oftentimes people compare, and they say, well, this program had a caseload of 87, and the other program had a caseload of 40. Well, that caseload of 40 could be more, a greater workload than the case of 87, again, depending on what types of activities they're required to do.

So in thinking about case management again and the caseload size, it's really important to consider what is it that's on their plate, what are they held accountable for completing, before just assigning kind of an arbitrary caseload size.

I think there's another interesting thing that I've seen more recently in the field, where it used to be ten years ago that I saw a lot of -- they have reduced caseloads for hard-to-employ clients, for case managers who are working with hard-to-employ clients -- so that you saw, you had those kind of -- those with personal and family challenges maybe would carry 25 cases or something like that.

What we're seeing now is programs are actually having reduced caseloads for work-ready clients. And I think this is maybe a function of the recession, where some clients are work-ready, but need that little extra support to get connected to the labor market.

And so because they are those people that they could bump up with relatively small investments, that they choose to put smaller caseloads and a greater intensity of services on those work-ready, as opposed to the hard-to-employ, in addition to or in place of the hard-to-employ.

Next slide, please. So many of you who are out in the field know these challenges really well, and I'm sure that you could add to my list here. I just kind of jotted down some of them.

I think one of the biggest challenges right now is managing high caseloads or workloads, especially, you know, we're out in the field now and looking at some of the challenges that TANF programs are facing with increased scrutiny and some of the budget cuts and other things that are happening right now.

And I think one of the challenges is really trying to figure out how to manage those caseloads and the workloads that they're facing. I think the other big challenge is engaging clients in program activities and having somewhere to put -- someplace to put people, so having access to different types of activities that they can place people in to meet work requirements, either be they State or Federal work requirements.

And we're also hearing some of the challenges with budget cuts affecting some of the supportive services, so things like transportation and child care -- really fundamental things that are supports that are really important for getting people jobs -- either delays or cuts in those kinds of services. So I think that's another challenge that TANF programs are facing.

I think this other piece of it is -- and I hear this from case managers -- is sometimes because there's such an emphasis on meeting the work requirements and enforcing the work requirements, that it sometimes creates a mixed message with clients, that sometimes it's kind of like trust me, I can help you. I'm here for you. But if you don't, I'm going to sanction you.

And I think case managers often really struggle with that balance of how do you provide that tough love kind of support to clients -- support them but also holding them accountable. And I think there's some case managers that really do that well, but I think it's more of a challenge to try and kind of figure out that right balance.

And then I also think with any kind of human services field, and this is no exception, when you're dealing with individuals that have some of the personal and family challenges that TANF recipients do have, and then also the workloads and all the other kinds of things that they're facing -- budget cuts -- they're always at risk for case manager burnout -- so being aware of that.

So next slide. So what are some of the strategies that I've seen out in the field? And I can recite programs and different things that I've seen across the -- over the years. But in stepping back from it, I really thought some of the stronger programs that I've seen really create a unified supportive program environment for case managers.

And part of that is really having this buy-in of this kind of mission and vision for what they're trying to achieve. So whether it be getting people jobs, helping them get them and keep them, I've seen programs that have marketing materials that have that kind of mantra or that really hook-in that really drives home their mission. And it makes workers feel like they're part of something that's really helping families to achieve self-sufficiency.

I think also building in resources for supporting workers, things like case staffing, so when they have difficult cases. And team-building activities is also part of that kind of supportive environment.

I think another piece of this that's really critical -- again, hiring staff at the right skill set for the TANF service approach. So if you're more of a work-ready, work first approach, then it's hiring staff that meet that -- that reflect those and has that skill set to achieve that.

Or if you're more around kind of barrier removal, or if you have a hybrid of both, again, it's thinking about what are the tasks that we're trying to achieve? And what would be the right skill set for making that happen as we're defining case management?

I think also creating clear expectations for both clients and the staff, the case managers themselves, so that there's a clear and consistent message -- that clients hear the same message that each of the individual case managers are saying. And again, it creates that kind of consistency throughout the program.

I think the other piece of it -- and I talked about it on the challenges slide -- is that balancing, that accountability with support for clients.

And I think again, some case managers do that more effectively than others, but I think that over time they figure out, you know, that figuring out that balance of really building trust, being that supportive motivational figure, but also enforcing participating, enforcing engagement, and really making sure that people are making progress.

Next slide. I think the other piece of this is providing meaningful work activities where case managers can play a supportive, motivational role. So it's really thinking about what activities are really going to help these families achieve self-sufficiency. And again, having said that, I also know that budget constraints have really constricted some of those activities, the availability of some of those activities.

But I do think it's important to say, are they having really -- are they linked into meaningful activities where the case manager can come together and join with them in encouraging and supporting them to move towards self-sufficiency and employment.

Training workers, I heard that on managing their caseloads, their reporting. Just providing that kind of basic level so that they understand what they're required to do.

I think the other thing that is popping up more recently again is creating management reports that really kind of raise this awareness of the client and the caseload status, so that the case manager is aware of who's meeting -- kind of who's meeting the program requirements, who's engaged, who's not engaged.

We hear a lot of talk about clients who are not engaged in any kinds of activities or hours. You know, raising awareness about that is, I think, a helpful tool to help case managers perform at their best.

And then finally, really tapping into the experience and expertise of case managers. Really valuing the knowledge that -- the practice wisdom that they bring.

And I think effective programs really do go back to the ground level and really request their involvement and their input when making program changes. So they include them on steering committees and they have a formal process for getting their feedback into that process.

So those are just some of the kind of the brief thoughts I had around case management. And again, during the discussion time, I'm happy to provide more examples and maybe point people to programs of where they might -- where I've seen some interesting kind of approaches to things.

But that's, I think, really kind of a standard, fundamental look at case management from my experience. So I'll end there.

Lesley Smith: Great. Thank you, Michelle. This is Lesley Smith with the Welfare Peer TA team. Next, I'd like to welcome Mike McCaman, Deputy Director of Workforce Development at the Franklin County Department of Job and Family Services in Ohio. Mike?

Mike McCaman: Good afternoon, everybody. Thank you, Lesley. Again, my name is Mike McCaman, Deputy Director of Workforce Development here in Franklin County, Columbus, Ohio. We are -- so I have -- my role is responsible for our TANF work participation program.

To give a little overview of our program here in Ohio and in Franklin County, the first slide there, Ohio Works First is the name of Ohio's TANF program. We have a 36-month time limit here in Ohio, and are a State supervised, county administered program. So, while the State of Ohio supervises and is overall responsible for the program, each local county is responsible for the implementation and administration of the program.

So, what we get sometimes is 88 different variations of how to run TANF in Ohio. But we try to really work together closely as counties, especially the larger metro counties, to have a consistent approach to the program.

Here in Franklin County, we are comprised of four local offices around the county that we call opportunity centers. And I'm going to kind of go through a lot of information, kind of telling our story over the last couple of years.

We found ourselves -- both in the Franklin County as well as the State of Ohio -- found ourselves at risk of some penalties -- funding penalties -- for failing to meet the 50% benchmark of work participation rates for a few years. And so -- we began in early 2011 -- began really in earnest to address this issue and address this program.

And so, part of what came out of that -- that I'll get into here in a little bit -- is creating one specific center in our county for all of our work-required TANF cases, where the cases are all housed, and all interviews and interaction with our participants are done in one centralized location. And currently, we have about 3,200 cases on our caseload, as of our last reports.

Go to the next slide here. Staffing structure -- we have kind of a triad of groups that come together to manage this program. We have the eligibility staff that works the eligibility of the cases -- so not just the TANF but also SNAP and Medicaid. And we have some specialized work activity staff, and a heavy reliance on community partnerships.

And now, prior to our kind of redesign over the last 24 months, we had a model where these three pieces were very segmented. And so, a participant would have a first interaction with an eligibility worker who would focus solely on the eligibility conditions of authorizing and approving the TANF benefits.

Then that customer would be scheduled for a later appointment across town, literally across town, with a different department, different set of workers, that would come five, ten, fifteen, thirty days later, if that person ever did make that transition. A lot of folks were kind of lost in that gap, but then we would make the assignment and track the work activities, and rely on some community partnerships.

So a big piece, though, of what we realized we had to do was, we had to take an integrated approach to this program, that you couldn't piece things out and have such clear definitions around eligibility and what constitutes work activities. And so we created our OWF Center. And what we did -- we did a few things.

One, we just brought everybody that works on OWF into the same physical location. So we're all in one centralized place. We also, on the front end -- you can flip here to the next slide. We integrated the tasks of the eligibility workers. So now, the case manager that will initially see an applicant and determine their eligibility will also address the work activity piece of that as well. So, as they go through the interactive interview -- and we -- well with our SNAP caseload, we would do quite a bit of telephone interviews.

We decided that for this particular group, the needs were so great that we needed to make sure we brought everybody in and had that face-to-face interaction to just really clearly go over the rules, the requirements, as well as to be able to thoroughly assess what barriers may be going on, and what specific support system one may need.

And so, we have two units of eligibility case managers. They see somewhere between 150 and 200 new applicants each week. And so, they're working on that constant churn of new applicants. And so, once they determine eligibility and assess that this customer is eligible for the program and is work-required, then we do a combined interview there. So they go through the assessment and the work activity assignment as well.

We also have, then, a third eligibility unit that's more of our case management eligibility maintenance unit that does the reapplication interviews. They work the six-month interim reports that we get, and just overall manage -- maintain the case for eligibility purposes on an ongoing basis.

Flip to the next slide. The work activity workers, then -- we have specific units -- so kind of to what Michelle was talking about -- the specialized worker. We've broken our work down by the function of the work that needs to occur.

And so, we have specific units that have been -- that are set up for tracking the time and attendance. And I would definitely echo what Michelle said. The amount of time that is spent on the monitoring, the tracking, the verification, and the entering of those hours is quite labor-intensive.

And we have another unit -- actually two units -- for any assignment changes -- work activity changes -- that may occur in between the eligibility determination periods, and that includes employment. And so, these units are if somebody, for example, starts -- is going to school now or has a child and needs to adjust hours -- any assignment changes that need to occur, we filter through these specific units.

If somebody gets a new job, we make sure we place a high emphasis on getting that information quickly so we can update the system -- not just for the benefit eligibility, but also for what entails with the work participation.

We have another unit that manages some of our vendors and community partners, as well as works with area businesses to create employment opportunities for folks. We have probably used anywhere from two to four onsite events each month, where at our location here, we have employers coming in to do some open interviews and to do some job fairs.

And then, we have a specific unit for the application of sanctions that come with the program as well.

The third corner of the triangle really is some heavy community partnerships that we have. We have a contract with a community consortium to manage our work experience program. We have specific services that we have contracted for refugee-specific services.

Here in Columbus, Ohio, we have a large refugee population, and so we've really worked hard both internally and with our community partners to set up and build a continuum of services that will both address new refugees' needs and specific needs that new Americans have, as well as meet the rules and regs and all the requirements that come with TANF.

And so, we've really been able, through that partnership, to marry those two and make sure that both are being addressed.

And we also have a good partnership with our local -- the largest community college here. So it's out of all of our individuals that are assigned to vocational education -- Columbus State Community College has well over half of them -- and so, we’ve developed a partnership with them where we have actually one of our Case Managers onsite there to address any questions or concerns to work with faculty and staff to track the hours that the students are participating, help students transition into other activities if they’ve reached the 12-month limit on their vocational education, as well as just be a, be a liaison and be a representative of our agency onsite there really for any student who may be receiving not just TANF but other benefits or may be in need of applying for benefits as well.

And so -- really those three areas -- we rely heavily on a structure that, while it does have specific roles, also recognizes that -- recognizes that it has to be a combined effort. And so, internally with our agency, we’ve really worked on cross-training and bringing everybody into the fold to say, you know, work participation is not just an issue of work activity workers. You know, I just do eligibility. No, it’s something that everybody needs to understand the role that their specific task plays into it, and everyone needs to have ownership of that as well.

So moving onto -- moving onto the next slide -- probably the -- well, the largest partnership that we have is for our work experience program, and so our process of what -- how we -- how we determine if the assignments for our participants at that first interactive interview -- if somebody is not already employed with enough hours or is not already in school or is basically not already participating in an activity, then we assign them to this community consortium.

And they have five convenient locations around the county. Just so depending on where the customer -- where our participant lives -- they're assigned to a location close to them, where the partner there will develop all of the work experience sites. So they're actually out in the community working with small businesses, large businesses, non-profits, other agencies to develop appropriate sites.

They do a thorough and comprehensive assessment of all of the WEP participants and then track -- assign each one to a particular worksite managing their participation daily, weekly, and monthly. This group -- they're headed up by ResCare Work Force Services and then partners with some of our other local agencies like Goodwill and Jewish Family Services.

They have a data system, and we'll talk about that in a little bit -- but the data system allows for individual participants to log their hours in an online timesheet similar to how our employees do here, and then each day, they're supposed to log their hours, and then that site supervisor can go behind them and approve or adjust, if necessary.

They also provide a lot of barrier removal -- a lot of barrier removal services, and so their case managers will work closely with our participants to address any family, personal barriers that may be, that, you know, keeping them from participating in work experience, keeping them from employment, and ultimately moving to self-sufficiency.

They're responsible for all of the non-core hours and bringing online -- have an online educational portal that can be complete -- all of the time -- has thousands of various courses, from customer service to computer programs, and everything in between, where all of the time, an individual spends on -- each page is time stamped and everything is controlled so that we can meet all the verification requirements for logging those hours. And then, they are the ones that are going to refer cases to us for a sanction if the customer is non-compliant.

What we do then is kind of balancing out -- we are the determiners of eligible here at the Local Job and Family Services. We make all of the work assignments, and so all WEP participants are assigned to this consortium. We enter the hours each month in our State eligibility system and then we apply the sanctions on the benefits as needed.

And so, this has been -- this has been a great partnership that we've developed and has really allowed for a high touch, high engagement approach, which is -- what we've realized and learned is, as I'm sure many of you have, that is really needed for this group, for this population. So, it allows -- it allows everyone involved to really focus on their strengths and to most importantly focus on the outcomes of our participants and improvise that -- I like how you said that, Michelle -- the balance between accountability and support.

And so, we're able to offer some in-depth support, as well as really enforce some accountability when participants just don't take -- just don't take advantage of that, and they'll comply with their requirements.

So, moving onto the next slide for our staff, you know, there are as an agency, obviously, you know -- the Medicaid, the SNAP, are much larger programs than

TANF, and then work participation is a smaller segment even of TANF. So, it's really some specialized training, and that we do for new staff coming in.

And it's kind of a partnership that we work closer with the State on that, so the State provides some really great training. A few times a year, they will provide work activity -- new worker training. They do it through a video conference, which makes it really convenient to push out a training to all 88 counties here in Ohio, and so we're able to, at our location, log on and receive that training that's specifically focused on TANF policy -- both State and Federal regs and rules and policy regarding the TANF work participation program.

And then another thing the State does frequently through these video conferences is provide ongoing training on just various topics that may be identified throughout the year as topics requiring additional training or the counties have asked for.

And so, just some examples -- recent trainings that have been done are around deeming hours regarding employment and work participation and how to -- how -- what are the proper ways to update cases in the system to ensure both accuracy with the benefit eligibility, as well as work participation rules. And then the most recent one -- assessments and ADA compliance.

So especially as we look at a -- what I see kind of increasingly more concentrated caseload of individuals with barriers -- both physical and mental barriers to self-sufficiency, to employment. How do we best meet their needs, as well as help move people forward?

At the county then, also, we also have a training department that provides kind of a standard 12-week training for all new case managers coming into the agency, which covers all of the public assistance programs that we administer, as well as work participation programs under TANF. There are ongoing refresher trainings, and then just various ad hoc training opportunities as needed. We try to keep a close pulse on -- actually -- through a number of case reviews.

Our supervisor team works really hard to review as many cases as possible, so we can identify ongoing issues and repeat issues and then can design some training around that as we need.

And so, we really work hard to make sure that our staff receives the training that they need, both from program policy, as well as our local -- our local mechanisms for administrating the program.

Move to the next slide. Case management can mean a lot of things, I think, to a lot of people, and so I was just kind of thinking through -- what -- how do we -- how do we define case management? And I think it has -- I think it has four essential elements for us.

One, we take a team approach. And so, we as a team own the program, and as a team, own kind of the management of each case. And so, it's not so much that oh, you know, Sally is here, and she is John's client. No, it's Sally's here, and hey, no matter what area I'm in, I'm going to interact with Sally and try to figure out what the next step is that she needs to take.

Well, and while we do separate staffing based on tasks, we can take a team approach and manage the case holistically as well. So, it's not just a matter of I did my part, and now I'm done. I applied the sanctions. Now it's left to an assignment worker to bring them back into compliance or reassign them. We try to instill in our staff the fact that anytime we're in a case, or anytime we're working with a customer, we try to own that whole case and provide all around case management with high touch interaction.

It’s really not enough to see a customer once a year at their redetermination, but in order to be successful, I think both to move our participants into self-sufficiency -- as well as -- as well as succeed with our work participation rates, we have to know at all times where everybody is. And we have to have mechanisms in place for frequent contact -- both contact that we initiate, as well as be available for any questions or concerns that they may have.

And so, there we work closely with our partners, our different sites, and our staff to make sure that at very regular intervals we’re touching base with folks, seeing how things are going on the work site, talking to the work site supervisor, talking to each participant, making sure that everybody is getting what they need out of this partnership.

And then, we focus on outcomes. And focus on outcomes that are not just -- not just outcomes that affect our numbers and our work participation rates, as important as that is -- but recognizing the families, the lives, the people behind those numbers and really focusing on what’s going to be best for each individual out of this. So kind of a balancing act of, how do we stay compliant with TANF regulations, but how do we make these regulations and these programs work for you to move you forward? And so, really looking at meaningful work assignments and really looking at the outcomes of those.

The frequency of our client contact -- we have in our work experience program, at least weekly there’s contact. There’s monthly expectations for all clients, and each month, we go through our entire work-required caseload and literally go case-by-case, making sure that we have kind of a direct reconciliation process --

making sure that we've gotten the hours for that person, or we've applied the sanctions as needed, or we've updated their employment. Whatever it may be, we make sure that we touch each case each and every month.

And then there's for eligibility -- there's 12 monthly application periods like I said, with six-month interim reports in between there as well.

So a combination of all of those really leads to -- should lead to the client knowing that -- knowing what's expected, knowing what -- what the expectations are for us as an agency, what the expectations are on the client and making sure that we are in frequent contact so that we don't have any loose ends or gaps that individuals could fall through.

Our next slide here, our intake process is one that we really revised pretty extensively, and so --what -- like I said before, we used to -- we would determine the eligibility and authorize the benefits completely independent of the work activity program. And so in bringing those together, we created a new intake process, where anybody can apply at any of our locations -- we have a "no wrong door" policy for taking applications -- but if applying for OWF, that participant needs to attend a face-to-face interview at our OWF center. And we have -- that's either that same day or the very next day is when those appointments are available.

If they're not currently engaged in an allowable work activity, then we make applicant assignments. And so we assign an individual -- for, over the course of two weeks -- to some job search and job readiness activities that do a couple of things. One, it really reinforces the approach of working first and of entering into employment and seeking employment as quickly as possible.

It also kind of -- it also really allows us to identify those participants that really just are not going to engage in the work activities at all and provides kind of a filter, if you will, right on the front end, where we make it clear what the expectations are, as well as what the support that we commit to providing around that. And our partner -- community partner for the work experience -- manages these applicants' assignments as well.

And so, after two weeks if a customer is compliant with that assignment, then the cash benefit will be approved, and that customer will move into a work experience -- an ongoing work experience assignment. And so, this process has really allowed us -- it's done a couple of things.

One, it's really encouraged people to go out and find employment, and so we've seen a lot of folks that have moved -- off of our -- off of our assistance and into self-sustaining employment. And -- that's been -- that's just been a really great thing to see as we've increased the accountability of the program, as well as the support around that.

And so, I will say too, how we, everything, every application is processed within the 30-day time limit that we have here in Ohio for doing that, and so this intake process really allows us to set the standards up front and encourage and set the tone that -- this is about -- this is about self-sufficiency. It's about employment.

So moving forward then, the next slide, to manage cases on an ongoing basis -- we use -- we have a heavy use of data, and so -- a couple of different -- a couple of different systems that we use. ResCare WORCS is the name of the system that ResCare and our community consortium uses to manage our work experience program.

And this is great, because it allows us to just daily upload electronic referrals out of our State system, so every day, as our workers are making assignments, those are automatically being uploaded then that night into the ResCare WORCS systems so they know what to expect, and at what day and at what location.

It allows us for ongoing alerts between their case managers and ours, so that we can have constant real time interaction over a customer. So for example, if a customer fails, stops going to their assignments and didn't return your phone calls after three days -- boom, we get an alert and are able to place a sanction there and stay timely on all of that case management.

And then, it allows us to track the hours down to the day. And so, that's the expectation for participants -- is to daily enter their hours, have site supervisors approve those weekly, submit it to our agency here at the county on a monthly basis -- so we can keep track of who is where, and what are they doing and update our system accordingly.

And then, we also have built some internal data systems as well. The State puts out a number of reports that we will slice and dice and really work and use to really focus on, to say what, you know, both to chart trends as far as what's going well, what do we need to address and find the cases that we need to spend our time and energy on.

We have scraping processes where we, where we pull data out of the State system that allows us for some real time reporting in terms of identifying our maybe unassigned cases or cases with the hours that aren't quite right, so that we can fix those as quickly as possible.

And then just tracking, tracking a lot of our work on a day-to-day basis. I liked also, Michelle, what you said about focusing on workload versus caseload, and so, we make an effort to have a daily pulse on what the workload is, so that we can then accurately adjust staffing.

Move to the next slide here. And in terms of monitoring our progress -- it's something that, this is something now that the last couple of years has been a top agency priority. It's been on the agenda, if not at the top of the agenda, pretty much at each of our biweekly senior staff meetings.

And what works nice for me is, as we've seen some success, it's fallen lower and lower on the agenda, so I can breathe a little bit easier now. But, you know, we issue some monthly communications on our work participation rate and make sure that everybody -- not just everybody in the department here but everybody in the agency -- is aware – again, that team approach.

We break -- we break -- the rate down, so this rate -- is it 50%? Is it above? Is it below? It's such a big number with so many factors that go into it that we need to break that down into some more tangible measures that can be monitored monthly, weekly, and even daily, and then have various managers over various areas assigned to each of those measures, so that we can both have an idea of what's going into that rate, as well as hold everyone accountable for their pieces and parts of the work.

We hold weekly staff meetings, where we're continually looking at what can we continue to improve, tweak, add, do differently in order to continue to improve, and then, even in our area, we started last year some daily stand-up meetings. So each morning, we -- our management team -- huddles for about 15 minutes just to focus on that day's priorities.

So kind of, the idea is to take that monthly work participation rate that we have and distill it down to -- what do we need to do today to ensure success? And we set some internal targets above that 50% of just minimum compliance, because we don't want to just be compliant, but want to go a little bit above and beyond that even.

The lessons that we've learned -- go to the next slide here -- the lessons that we have learned in our journey over the last few years, you can't say enough about team work. This, a huge reason for our success, so by the way we've, in fiscal year '12 we've made the leap from 25% work participation rate and finally achieved that 50% benchmark.

We could not have done that by taking individual approaches, individual workers, individual departments or units. We approached it as an agency really of the community and so that's kind of a second lesson that -- we can't do this alone as The Job and Family Services Agency in Franklin County.

We require -- it takes a community to manage a TANF program because there's so many pieces and parts that need to go into it. There's so many barriers or wraparound services. We just can't -- or we don't -- have the capacity, I don't think any agency does, to provide everything, and so we've worked hard to develop community partnerships to approach this as a community where we share in the outcomes, we share in the success.

Data -- can't do this without data, either especially in a county such as ours, with thousands of work-required individuals. This becomes a matter of who is where and when, and so we've used extensive data to know where to focus our limited resources or limited time or limited, you know, staffing that we have to really get the bang for the buck for the work. So creating management reports, pulling apart massive spreadsheets of data to find what are the things that we're doing right, what are the things that we still need to improve.

And then we focus -- we really try to focus -- our efforts and our mentality on the outcomes of this program and not just the participation, so really focusing on jobs. And it all comes down to jobs. Last year, we were able to place 1,700 OWF customers into employment throughout the year 2012.

And that's really, is our biggest success, is being able to move people from public assistance into self-sufficiency, and so that balance again of meeting the participation rate and following the rules and regs, but really focusing on the outcomes of these individuals. Really seeing families and children move forward in life and offer assistance in the self-sustaining employment through these work activities. So those are, like I said, we've been able to thankfully hit both of those, hit our rate, hit those compliance measures, but also see behind that families moving forward.

Taking a look at the last slide, this has my contact information. I know there's a Q&A here at the end of the presentation, but if anybody would like to reach out for any other questions or anything, feel free. And thank you again, Lesley, for the opportunity to present today.

Lesley Smith: Thank you, Mike. Appreciate that. And next, I'd like to welcome Dean Simpson, Chief of Economic and Family Services within the Division of Social Services at the North Carolina Department of Health and Human Services. Dean...

Dean Simpson: Thank you, Lesley, and good afternoon, everyone. I just wanted to take a few minutes to talk about some strategies Statewide that we are looking at doing. We

-- like -- North Carolina like Ohio is a State supervised and county administered State. We have 100 counties in North Carolina, and I just kind of wanted to present a little bit of information of what we're doing at State level as far as strategies to integrate our programs, our services, how we provide benefits to our recipients.

Historically, North Carolina has been a very siloed State as it relates to programs and services. Every program, such as the SNAP program, TANF, Medicaid -- all of those were in different divisions, and every program or every division had its own manual and its own application -- its own way of doing business. And we also in North Carolina over the past have been very paper driven, but now we are in the midst of rolling out and implementing our new North Carolina's Family Accessing Services through Technology or NCFAST automated systems.

So I just wanted to talk about a few strategies and the things that we have done and are planning to do over the next year or two to help with providing a more holistic service just to the families that we serve.

And then, of course, the next presenter will be Barbara from one of our urban larger counties who will talk specifically about what, Wake County, which is the large county here at Raleigh, the State's capital, has done in integrating services.

So with that, over the past year, well really the past two to three years, North Carolina has worked with the various programs that we have done, the SNAP, TANF and Medicaid, and we've looked at integrating all of those different programs at the State level.

We have integrated looking at implementing a new integrated manual. Again, as I said before, we have integrated siloed programs with all of the various manuals.

So we spent a large amount of time in looking at our policies, our procedures to really get down to what are those core Federal regulations or policies that are crucial to our programs and services, and we tried to streamline those and to make them where they talk alike, act alike, and walk alike, so it makes it much easier for the staff out at the county level to implement the programs and to complete and determine eligibility for the program.

So we were very fortunate -- North Carolina was very fortunate in receiving and being granted a three-year grant-funded opportunity to work with work support strategies in looking at making our staff and our thought process very universal. And by that I mean is that when a person comes in or a family comes in that our motto is: “Families will tell their story one time and receive the benefits or services they are eligible to receive.”

And that’s truly where we want to be is that whatever benefit or services that that family is in need of, then we want to make sure that it’s a one touch process that they don’t have to repeat their story or their situation over and over and over again.

So we spent a lot of energy and time and effort in looking at streamlining those processes and to help the counties to get ready for the implementation of the case management tool that is going to help them to meet that goal.

We’re looking at integrating all of the processes -- the interview process, the questions that are asked so that it’s truly universal. Over the past year, we have implemented and now have it -- totally automated is the process with our SNAP program. All 100 counties are now doing electronic applications and case maintenance. We also have implemented the electronic -- the ability for anyone out in the county or anyone that wants to go online or wants to submit an application that is electronic.

As I've stated before, we've been very paper driven, and so now we've come into the 21st century, so we like to say, and we're able to do this electronically.

Another process that we've implemented also along with our electronic application is the ability to do document management. That is something that counties individually may have done but at the State level, we did not have that as an option, so part of our NCFAST process will be to offer that document management ability for counties to scan and provide documents. If a family moves from one county to another, then all of that information is readily available.

The flag that's up now on our next process is, of course, to get ready for the Affordable Care Act and to really get our automated system ready and willing and able to accept applications where it relates to the Affordable Care Act and to the exchange or the marketplace.

So we're busy at this point in time and getting prepared for the October 1 date, as you can see by the slide what the schedule is. We have done all of our rollout in phases, which means that we've been doing what we're calling a pilot soft launch.

We have pilot counties that will be testing the system as it relates to the Medicaid and TANF component of it -- the F&S or the SNAP -- I'm sorry -- we call it The Nutrition in North Carolina. The SNAP program -- we did in the same process. We did it as a pilot county, as a soft launch, which means it's new applications.

And then, we went into what we call the hard launch, which would be for our ongoing cases, and so we will do the same process for the, as we call it, P2-6 and P7. We do all of our programs in phases so we are following the same process. We found that it's been very beneficial to do it in this type of launch where you have staff getting familiar with the process as it relates to applications and then doing the conversion and working with the ongoing cases.

So by October 1, as you see, we will have all of our means tested programs for SNAP, TANF and for all of the Medicaid programs, as well as for our Affordable Care Act ready and ready to take new applications at that point in time.

So with that, what I'm going to do is to turn it back to you, Lesley, for the next part of the presentation.

Lesley Smith: Thank you so much, Dean. Next I'd like to welcome Barbara Harris, Child Care Subsidy and Work First Program Manager at the Wake County Human Services in North Carolina. Barbara...

Barbara Harris: Hello, everyone. It's nice to be on the event this afternoon. I am going to talk about Work First and the many dimensions of Work First. I would echo what the previous speakers have said. I could take parts of everything they say and say ditto to what we do here in Wake County. Next slide.

North Carolina's Work First program is built on the premise that parents have a responsibility to support themselves and their children, and through that means, what we look at is employment focused services designed around the family hoping to lead to self-sufficiency for that family.

Our priorities, our strategies revolve around diversion. If we can, when the family contacts us initially, if there is a service that we can provide that will take care of their initial need, then an application for Work First is not taken. We either divert them to another resource in the community because our community partnerships are extremely important to us.

If they are working, we also might use Benefit Diversion, which is one of the support services attached to the Work First program. An example would be someone who is employed already, they have a major crisis with their vehicle, and that's their only way of getting to work.

If a onetime benefit will take care of that repair and that family continues to be ably employed and continues to support their family, we will do that and the side benefit for the family is they don't use months off of their 60-month time clock, which I consider a very precious commodity for families, because, like anyone else, they don't know what the next crisis will be -- if those 60 months were exhausted, they may not have an alternative.

Job retention is a major focus of what we do. We try to provide all the support services families will need in order to retain their job, working with them even after employment to do -- first, to make sure that if there are any crises that would impact their ability to maintain their job, we try to intervene where possible.

And we've maintained a pretty good rate on that. It is above 70% of the families who leave Work First for employment in Wake County remain off Work First after a year.

Next slide.

These are the basic requirements of Work First in North Carolina and probably across the country. So I will not necessarily get into those as the typical child under 18 must be a citizen or qualified immigrant.

Next slide.

Our process when families come to us is to do a brief -- very brief -- orientation of what Work First is, the obligations, the requirements of the program, what support services are attached to the program.

We also -- for families that are -- where the parents in the home, we'll also do an initial family assessment.

That assessment is not as detailed as the assessment that will be done later. But it gives us a feel of the strength of the family, the needs of the family, the barriers that exist. If there is some -- another resource, again, that may meet their needs other than Work First, then we want to have them do that.

But as well, it lets us know, they may have come in and identified Work First as the reason for them being here, but there may be other resources within that agency that they also could benefit from. So this is a way of getting to know that family, and then making all of the resources available that will support that family moving forward and then advising them of next steps.

Application process would be to make sure they're referred to a case manager, and that case manager will take and process their application. And that is a dual track, because employment services is also happening at the same time. In fact, the person who does the family assessment is an employment counselor. And if that family is referred for a Work First application, that assessor becomes their ongoing employment worker.

And that, for us, is important, because we feel that establishing that relationship from the very beginning of working together and creating and supporting the goals for that family -- helping them to reach their objectives is our goal.

And I've already mentioned our followup services to provide -- if a family goes to work to work around any barriers that might be in place.

I'd also say -- and we'll get into this in more detail in later slides, but -- the employment services are the key for those families where employment is the goal. We do have a separate population of Work First families that do not go through the assessment because they are child -- what we consider child-only cases in North Carolina. They don't live with their biological or adoptive parents.

Next slide, please.

We have a 45-day time frame to process applications. But the average processing time is around 24 days. And we follow -- policy requires the application be processed within five days of receiving the last piece of information. And that's the Wake County objective. We feel that if families have come to us because they're in crisis, then we have an obligation if at all possible, to act to their having met their -- the -- objective we've set or the deadline we set once you get all the information in, we will process your case as quickly as possible.

And all applications must be in person. Next slide.

Again, I spoke previously of the child-only cases. These are cases that live with a designated relative other than their parents.

We work for benefit cases including one or both parents. We also administer the Refugee Cash Assistance program. We have 200% services like TANF-EA. These are families who are employed and may fit in the category of the example I mentioned where someone is employed but they have a crisis. If we're able to take care of that crisis through 200% service or TANF-EA, they do not come onto the ongoing caseload, and the family continues on their track towards economic self-sufficiency.

Next slide.

We feel that our employment services are essential. We support short-term training, CNA, hospitality, food services or the areas that -- and those I mention because those are areas that -- for families who have little to no work experience, these are areas that we can provide short-term training that they can get in, go into entry level position and then move up, advance their career by going through further training or moving up into agency or a facility where they're employed.

We use vocational testing quite a bit, because sometimes we find families who have -- or individuals who have been -- able to get a job. The issue had been to keep the job. And so we use vocational testing. We want to find -- look at aptitude toward particular careers, as well as doing placement activities, and the people that do the vocational testing also do situational assessment for us. And that's a three-week program, where they observe them, and they simulate work experience – positions -- and look at the interactions with them and others to determine what may be the barriers, and what may be the next steps for us working with that family.

We have a strong relationship with Wake Technical Community College. They teach a three-week job readiness class here on site. That has been very beneficial to our consumers. And in fact, we have some employers who agreed to hire based on the fact that the participants have gone through this three-week training.

I've mentioned Benefit Diversion earlier. That is a strong support service. Child care is essential. One of the things I think one of the earlier presenters talked about was the reduction in the amount of child care available, and we are finding that does -- has had an impact on us.

We are only able to serve three priority groups in Wake County for child care. Thankfully, one of them is Work First employed because without that, our program would be devastated. We cannot ask folks to participate in job activities or go to work if they don't have daycare among other mandatory things like transportation, et cetera, that you have to have in order to move forward.

Next slide, please.

I also mentioned transportation services. We provide bus passes, gas cards, and have a contract with the individual company to provide what we call door-to-door services.

Wake County is such a large county. It is both urban and rural. And in the rural areas, we do not have general transportation available. So in those situations, short term, we will provide transportation, door-to-door transportation through van service.

We can provide emergency assistance for utilities or rent. We're fortunate in Wake County to -- our partnerships including one with our local domestic violence agency where we have a domestic violence counselor here in our building available to counsel our client and to educate them as part of the three-week class taught by Wake Tech.

They also help educate our staff so that they can help identify signs of domestic violence and then help us to work our next plan, next steps again. When we develop the mutual responsibility agreement with the family, if domestic violence is an issue, we need to know that. It may be something that -- obvious that if their court date or living situations that need to be changed because family is in danger, then we need to take care of those things.

We also have substance abuse counselors available here that help do screening for substance abuse and referral for treatment.

We have one of the few State supported facilities called CASAWorks in Wake County that allows families where substance abuse is an issue to enter a residential program for one year to help them overcome the issues related to addiction and, hopefully, that they would be able to move forward after that year.

We provide family counseling. We have a mental health clinician who is also housed with us. And we have available psychologist time up to 20 hours a week. And that has been very helpful, because all the data shows families who live in poverty tend to suffer depression at a much higher rate, or other mental health issues. So having that service available allows folks who need meds, to have those meds prescribed and to be able to obtain them with that service easily.

We found in the past that when that service was not available in-house, we had a hard time getting our participants to make themselves available to the service that, in effect, was not a block away, but we could not get them from here to there. But the services utilize much more effectively housed in the same building.

Next slide.

We've talked previously about the policy of doing assessment, the applications, and signing of the MRA.

I think the MRA, or the Mutual Responsibility Agreement, is the basis of the work that we do on the employment side or in moving families towards self-sufficiency, because at that point, they're identifying the outcomes that they wanted to see and objectives they want to have that family achieve. And we're working with them to identify next steps and what support services we need to put in place.

If someone wants to be a CNA, for instance, then what are next steps? Or if you don't have your high school diploma, what are next steps? How can we help you get there if eventually you want to be an RN? How do we help you get there? All of those things are a part of the MRA. It's required at least every 90 days but is done more frequently when needed. I stated before able-bodied parents are required to sign an MRA.

Next slide, please.

I've mentioned Benefit Diversion before, an alternative to our traditional Work First. And as you can see, we help families to maintain employment; during that same period the family is eligible to receive Medicaid.

And we do appropriate referrals for child support, which is key. We think that is a key, not only because of the financial support that it provides for children, but it also is, hopefully, an opportunity for that absent parent to eventually be able to form a relationship with their child.

Next slide, please.

Other services associated with Works First is if it is your first employment, and it is expected to be permanent employment, then the family is eligible for the job bonus. That is getting ready to change somewhat but still job bonus will be -- I think this amounts to incentive for families to go to work that they continue to get some benefits for three months even though they've gone to work and maybe their wages have made them ineligible.

We always evaluate for Medicaid. We talked about child daycare. We continue to look at daycare and any new ways that we can, through community support or other avenues, increase families' resources for child care, whether that's through scholarships from churches or daycare centers.

At the time this particular slide was done -- we always participate in State projects when we are able to and asked -- and we participated in a job boost program, which was a program that allowed employers to hire Work First eligible families or TANF eligible families, and their wages were supplemented for a period of time.

We were able to, during that time, have some families benefit from -- to obtain jobs and were able to retain those jobs after the reimbursement ended.

We work on the goals that are established by the Federal and State government. We certainly are very well aware and strive to make the all-family participation rate as well as the two-family rate.

We do a much better job with the all-family rate than we do with the two-parent households. I think that’s in part because there’s such a small number of two-parent households. If one family is not cooperating, it can really damage your chances of making that rate, and it is a higher rate close to 90% versus the 50% for the all-family rate.

We look at the number of folks that we’re able to support going -- obtain employment -- the number of adults entering employment as well as looking at the retention rate of those jobs. We consider those key factors to determining whether the program is successful or not, because the success is the families.

Next slide, please.

We have horizon issues. As Dean mentioned before, Wake County is in the process of getting ready to implement NCFAST as far as Work First and Medicaid is concerned. SNAP is fully going in Wake County, Work First and Medicaid. Our soft launch date is August 19 at this point. And we look forward to being a part of that. It gives us new opportunities to have a system that is user friendly for the client. While it will not allow -- it still requires a face-to-face for Work First and Medicaid -- it provides a way of not having to enter the agency to apply.

And then also, the consistency of policy across programs will make it a lot easier for families to understand the work we do.

Benefit issuance card -- that relates to the fact that we are thinking that a system will be put in place through NCFAST that will have direct deposit available among other options for families receiving financial services.

And the option of direct deposit is one that I think is really a great option, because it helps families move more into mainstream America where banking is done through automation, like everything else. And everybody has a smartphone of some type. So that allows that family to be able to do that.

And it also saves them money, because many of our families use check cashing agencies that cost them to get their benefits -- the check cashed each month. So that will have multiple benefits.

Another horizon issue is always the reauthorization of TANF and what that means if it ever comes, because it certainly -- it has been delayed because of other issues over the past few years. And I don’t know that it fits now, but it is something that is always something you have to keep in the back of your mind of what any changes in authorization will mean for the program.

Next slide.

At Wake County, we have several locations where you can apply. The main office is in Swinburne. And then we have regional sites in the eastern, northern and southern part of the county. As I mentioned before, we have areas that are -- it’s a large county and geographically, it is hard for everyone to come in to the Swinburne Building. So therefore, other main locations -- the regional sites were set up and pretty much all of the services available here at the main office are available at the regional sites as well.

Next slide.

And that's me.

Thank you very much for your participation.

Lesley: Thank you so much, Barbara.

And thank you, everyone, for still hanging on. We've gone over our time just a little bit with the wealth of information our presenters have shared.

We still will continue with the question and answers.

I just wanted to point out that we have gathered some resources for everyone to look through when you're thinking through process about how to enhance your case management services. There's a couple of slides of these. The links to their documents are in the presentation materials. And most of these materials are already on the Welfare Peer TA Web site. So you can find them there.

Moving on to the question-and-answer session, if you haven't already, you can submit a question through the chat box, which you'll find on the right-hand side of your screen. If it's for a particular presenter, please specify so.

We already have some questions in the queue. And I'm going to go ahead and get started.

Michelle, this first question is for you.

In your research experience, what practices have you seen in programs that promote improved performance outcomes in both staff and TANF participants?

Michelle: If I knew the answer to that, I would be a rich woman. It's definitely not a one size fits all -- I don't -- I mean, there's really only one study that has shown improved program impacts and that's the building the Building Nebraska Families that relates definitely, and it's a home visiting-type program that's focused on kind of more comprehensive case management. And that's available on our Web site.

I mean, there's other studies out there, but it's really -- I wish I could point to any one strategy, I think, that has documented experimental assignment design, you know, outcomes. I think that there's a lot of kind of potentially promising practices, and there's a lot that hasn't been evaluated, too.

But I think in asking that question, too, I've been doing a lot of promising practice studies. I think you really have to read -- there's no one-size-fits-all in terms of like what they do in, you know, Franklin County is going to work in, you know, Missouri. It's really taking kind of the principles of different programs and then applying them based on kind of your own community, and what your needs and resources are, and your staffing structures, and being able to really take concepts from other programs, and then applying what may seem like a promising practice and then tailoring it to kind of what your community is.

So that's a longwinded way of saying in terms of the research, there's not a lot that says this is exactly what works. I wish I could provide more support on that front.

Lesley: Great. Thank you. I appreciate that.

The next question is for Mike in Franklin County. A participant wanted to know, do you have the training guide for the 12-week new case management training that you'd be willing to share?

Mike: I will have to look at that -- contact our training department. I know I have the State-issued worker work activity specific training guide. I will have to check with our training department, though, to see what we have on the 12-week internal one.

Lesley: Okay.

Mike: It's something, maybe, Lesley, I could get back to you on.

Lesley: Yes. And we can follow up with that specific question. Thank you.

Mike: Yes.

Lesley: Another followup question for you first, Mike. Could you describe any strategies for working with non-English-speaking participants and meeting work participation rates?

Mike: Yes. So we have a pretty extensive LEP population here. One of the things that we've done is, we have some contracts with two -- with three community partners that focus on -- they do both refugee resettlement, as well as refugee and other LEP services. And so, kind of some strategic partnership to get the culturally and linguistically appropriate case management.

With them, they develop sites that can accommodate also a lot of times those folks' native languages. So as people are here longer, there's smaller businesses that's sprouted up, restaurants, stores. And so we engage with them to host work experience sites and then using as much -- pumping as much ESOL in as you can.

Now, unfortunately, if you ask me, the fact that that's limited to the non-core hours is something that would definitely be on my reauthorization wish list, because you really need as much intensive ESOL as possible in the program.

Lesley: Great. Thank you.

And for Barbara in Wake County, could you describe what you meant by the STEPS class?

Barbara: I'm sorry. Yes, the STEPS to Self-Sufficiency is a job readiness course. And it teaches from basic tips on dressing for success, as well as résumé development, as well as anger management, social interactions (appropriate and non-), basics of just job readiness, what you need to know in the workplace.

Lesley: Great. And a followup question for you, Barbara. Could you describe what the job bonus amounts were in that structure?

Barbara: In the present structure, it is the amount that the family is receiving at the time they leave WorkFirst for wages. The proposed structure will be a flat $100 a month for three months.

Lesley: Okay. Thank you.

And back to Mike in Franklin County, is your computer-based case management system a product that's developed by the State or a private software company? If you know.

Mike: Yes. So we have -- we use -- we function in two systems. There is a State eligibility system called CRISe that -- where we do all of the eligibility and ultimately track or enter, you know, the hours and everything each month. But for the day-to-day case management, that is a system that our contracted partner has developed. It's called ResCare WORCS, W-O-R-C-S. And that has been developed by ResCare Workforce Services.

Lesley: Okay. Thank you.

And, Dean, would you like to touch on that question as well for NCFAST?

Dean: For NCFAST, the company that we have with is Cúram -- is a Cúram product. And then we are doing, you know, some enhancements to set our policies. But we contract with Cúram.

Lesley: Okay. It's a private company not within the State system.

Dean: Yes. That is correct.

Lesley: Okay. Great. We're moving on. We have a question. We'll start with Mike again.

What types of assessments are case managers using? For instance, personality tests, aptitude, skills, service need, et cetera.

Mike: We've been using primarily the CareerScope Assessment.

Lesley: Okay, thank you. And, Barbara, for yourself?

Barbara: Pardon me. I'm sorry. Would you repeat the question?

Lesley: Yes. What types of assessments are case managers using? For example, to test personalities, aptitude, skills, service need.

Barbara: We have a -- two that we developed here as well as the two that we have used from -- through vocational services. So we have a multitude.

Lesley: Okay. Could you speak to what they're actually testing? So they're vocational based?

Barbara: Yes.

Lesley: Okay. Thank you.

Okay. We're going to make this our last question for now before we wrap up. We'll go back to Michelle with Mathematica.

In your research, have you found organizations with good case management training for the actual staff?

Michelle: You know, I haven't looked at that systematically as the actual training itself. So I don't have that right off the bat. But if that person would contact me, I could probably link them to somebody who might be more helpful.

Lesley: Great. Thank you.

Very good. Well, thank you, everyone, for your submitted questions. If there are any that we did not get to, we will share them with the presenters to see if they have any feedback. And those responses will be included in the final transcript.

I'd like to turn it back over to James Butler from the Office of Family Assistance to provide some closing remarks.

James Butler: Thank you, Lesley.

And I just want to close out by thanking all of you for joining us today. A special thank you to Michelle, Mike, Dean, and Barbara for sharing just a little bit of the wealth of knowledge that you possess around implementing comprehensive case management strategies in your TANF programs.

As a reminder, a transcript and the audio recording will be made available for everyone who registered under the Peer TA Network within the coming weeks.

We'd love to hear from you regarding future webinar topics. So if there are topics you would like to hear more about, please submit your ideas by e-mail to peerta@icfi.com, which should be showing onto your screen at this moment.

Our next webinar here in OFA will provide similar content coming from a Tribal perspective. And that will happen on Tuesday, June the 4th, from 2:30 to 4:00 p.m., eastern time. And you can register for that particular webinar on the Web site as well.

You can also help us expand our network and reach a greater number of people by directing interested colleagues from your local and State networks and agencies to the Web site as well.

Please be sure to complete the evaluation poll that will be coming up on your screen.

And on behalf of the Welfare Peer Technical Assistance Network, under the leadership of Lisa Washington-Thomas, the Office of Family Assistance, and I would like to thank all of you for participating in today's webinar. Have a great afternoon.

Operator: Ladies and gentlemen, that does conclude the conference today. We thank you for your participation and ask that you please disconnect your lines.

END