



Summary Report

2024 OFA Regions V-VIII State Technical Assistance Meeting

August 2024

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Submitted to James Butler, Contracting Officer’s Representative, Office of Family Assistance.



I. Meeting overview

The 2024 Regions V-VIII State Technical Assistance Meeting was designed to inspire Temporary Assistance for Needy Families (TANF) program leaders and staff to engage in evidence-driven program improvement that centers the experiences of TANF participants. Meeting attendees explored and reflected on how TANF participants could be involved in program decision-making, enhancing program design, and improving their experiences with the TANF program. The agenda provided opportunities for peer-to-peer learning, group discussion and idea generation, and networking among Federal and state TANF colleagues. Specifically, this meeting aimed to:

1. Increase meeting attendees' awareness of the lived experiences of people and families who participate in TANF programs.
2. Increase meeting attendees' awareness of factors that may shape TANF participants' experiences and outcomes in TANF programs.
3. Increase meeting attendees' awareness of the potential benefits of engaging TANF participants in program improvement.
4. Increase meeting attendees' understanding of considerations and strategies for engaging TANF participants in program improvement.
5. Create opportunities for meeting attendees to share their TANF programs' bright spots, challenges, and opportunities.
6. Support meaningful, collaborative exchanges among meeting attendees.
7. Create opportunities for meeting attendees to collaboratively generate ideas for improving TANF programs with input from TANF participants.

Before the Region V-VIII State Technical Assistance Meeting, the planning team asked meeting attendees to complete pre-work and record short video reflections, which were shared with all meeting attendees throughout the meeting. The planning team of OFA staff and contractors intended, through the design of the meeting, for meeting attendees to leave feeling ready to develop, revise, expand, or implement plans for engaging TANF participants to inform improvements to their TANF programs.

The meeting was held on July 9-11, 2024, at the Westin Denver Downtown in Denver, Colorado.

II. Session overviews and highlights

This section of the report includes details about each session at the meeting, including session time, presenters (if any), and a high-level summary. For substantive sessions and when relevant, we also summarize the topics of discussion during the session and the session's key takeaways. Sessions are listed in chronological order.

Day 1: Tuesday, July 9, 2024

Testimonial and Facilitated Panel Discussion (Session 1) (9:15–11:30 a.m.)

Presenter	Affiliation
Kimberly Thompson	Program Specialist (Regions V and VII), OFA
Elizabeth Newton	Family Advisor, Colorado Department of Human Services (CDHS)
Susan Moritz	Alumna, Colorado Family Voice Council
Joanna Rosa-Saenz	Member, Colorado Family Voice Council
Brenna Spang	Benefits & Services Section Supervisor, CDHS
Rebecca Balu	Employment & Training Manager, CDHS

Kimberly Thompson and Jody Atwood shared their lived experience with the TANF program. A panel of past and present members of the Colorado Family Voice Council (FVC) and leaders from the Colorado Department of Human Services (CDHS) shared their experience planning and starting the Family Voice Council. The panel described how CDHS used participant voices to make improvements to services and service delivery.

Key takeaways from presentations:

- Family Voice Council members suggested that state-level TANF administrators visit TANF offices in person to understand how TANF participants are treated, what their experiences are like, and how staff can better support participants.
- Panelists spoke about the value of exploring the perspective of how TANF participants—especially those experiencing a crisis—experience program processes and policies.
- The FVC includes about twenty members with lived experience in programs like SNAP, TANF, and child support. Members receive professional development opportunities in the form of projects or initiatives (such as reviewing grant applications). The FVC meets monthly for four hours and representatives from different programs come to solicit feedback from the council. CDHS has made about fifty policy changes to date in response to FVC input. For example, CDHS administered an exit survey for their TANF participants, and respondents’ feedback helped CDHS make changes that resulted in increased program participation.
- CDHS leaders shared that soliciting feedback from the FVC saves the program time. For example, the program does not have to make as many revisions to policies or processes because they gather lived experience input beforehand. CDHS tries to create a feedback loop by hosting public feedback sessions for every rule change, documenting all feedback received, and reaching back out to tell individuals what happened with the feedback they shared. CDHS has FVC members present at all-staff meetings so that the program can continually hear from the program participant’s perspective.

Areas of discussion and interest:

- Meeting attendees were interested in learning more about the strategies CDHS uses to embed program participants' and families' perspectives into daily program operations. Attendees also wanted to learn about some of the factors that help and hinder CDHS' engagement with participants and families.
- Meeting attendees were interested to know more about how and when to close the feedback loop with program participants and families after feedback is shared. Shaun Stevenson and Ella Gifford Hawkins explained the importance of following up with participants and families and its direct connection to building and maintaining trust with families.
- Meeting attendees asked panelists for advice on challenges their programs currently face, such as staff implicit biases and state-wide caseloads that lead to staff feeling overwhelmed.

Preparing to Engage TANF Participants in Program Improvement (Session 2) (1:00-2:15 p.m.)

Presenter	Affiliation
Ian McMahon	Director of Employment and Benefits Division, CDHS
Heidi Widmer	Community Collaboration Assistant Director, Kansas Department for Children and Families
Ella Gifford- Hawkins	Ella Gifford-Hawkins, Managing Consultant, Mathematica
Shaun Stevenson	Advisory Services Analyst, Mathematica

Shaun Stevenson and Ella Gifford-Hawkins presented ways to engage families in program improvement and the importance of building and maintaining trust with participants. Ian McMahon and Heidi Widmer shared lessons learned from how their programs have engaged participant voices in their improvement efforts.

Key takeaways from presentations:

- Family input matters in ensuring programs address the needs of families.
- There are multiple ways to collect and use family input (such as surveys, interviews, and family advisory councils). What matters most is that programs act on the feedback participants share and improve the program experience for families.
- Building and maintaining trust with participants is critical to receiving meaningful feedback. It takes time to build genuine relationships with families.
- Assessing the program's readiness for change and pursuing realistic improvements promotes changes that will last and be infused into the program's processes, practices, and culture. Heidi Widmer shared her experience that "programs should never underestimate the power of participants' voice; it has changed the culture of our organization."

Areas of discussion and interest:

- Meeting attendees discussed hypothetical scenarios focused on common challenges in TANF programs. Attendees brainstormed approaches to respond to their scenarios by gathering input from families.

Many attendees shared personal reflections about how the scenarios aligned with the challenges experienced in their programs.

Preparing to Engage TANF Participants in Program Improvement (Continued) (Session 3) (2:30–3:45 p.m)

Presenter	Affiliation
Elizabeth Newton	Family Advisor, CDHS
Ndeye Ndao	Community Engagement Specialist, CDHS
Ian McMahon	Director of Employment and Benefits Division, CDHS
Shaun Stevenson	Advisory Services Analyst, Mathematica

Panelists shared their experience recruiting families to provide input. Panelists described how CDHS has found success in sharing power with families, specifically through the implementation of the FVC. Panelists highlighted the [Family Voice Compass](#), a toolkit that FVC and CDHS created together to support other TANF agencies that are attempting to create something similar in their programs.

Key takeaways from presentations:

- It is extremely important to CDHS staff for FVC members to be compensated for their time. CDHS staff worked with their Human Resources and Accounting departments to develop a compensation policy; CDHS consulted with community organizations to understand the tax and public assistance eligibility implications of compensating FVC members, and researched minimum wage, cost of living, and volunteer hour requirements to determine a meaningful wage for members. This process took several years.
- A few strategies CDHS uses for recruitment include word of mouth, LinkedIn, attending and presenting at community events, and reaching out to community-based organizations.
- CDHS shares power with FVC members by co-chairing monthly meetings. CDHS partners with FVC members to schedule a time to discuss the flow of the meeting and draft the agenda. FVC members also receive opportunities to go to conferences and share their experiences on behalf of the council.
- Building trust is the most important factor in shifting power. Interactions with program participants sharing feedback cannot be transactional; instead, programs should co-design solutions with program participants to build trust and good working relationships with the families they serve.

Areas of discussion and interest:

- Meeting attendees asked about strategies to make the case to their agency leadership and legislature for a family advisory council. Panelists suggested tailoring the approach based on what specific leaders find persuasive:
 - **Some leaders respond to personal stories.** Programs can invite leadership into program offices or into the field to have personal interactions with program participants, during which program participants can share their stories or feedback directly with leaders.
 - **Some leaders are more data driven.** Programs can highlight the return on investment and efficiency gained by including participants' voices in program improvement. By sharing power with

families, programs get information about how to better support families, reducing the need to rework or abandon attempted improvements or changes.

Innovating for Better Outcomes (Session 4) (4:00-5:00 p.m.)

Presenter	Affiliation
La Sherra Ayala	Deputy Director, OFA
Kisha Russell	Regional Program Manager (Regions VI and VIII), OFA

Presenters La Sherra Ayala and Kisha Russell provided an overview of forthcoming changes under the Fiscal Responsibility Act (FRA) of 2023. La Sherra shared a summary of the following: Interim Final Rule, Work Outcome Measures, Work Participation Rate, the timeline of the FRA pilot, the process for defining well-being for TANF families, program design for the FRA pilot, and the Program Quality & Organizational Impact Analysis. La Sherra and Kisha answered questions from the meeting attendees.

Questions	Answers
Is OFA expecting states to update their systems/forms to match the new fields requested in the new TANF Data and Reporting requirements (TDR) (e.g., gender)?	<p><i>Note: This question is not about the Work Outcomes Measures.</i></p> <p>No, states are not required to match the additional gender reporting codes with their system. In the spirit of equitable data, we added new gender codes to provide more options in case states already use codes beyond Male/Female that they can now incorporate. but it is fine if they only use M/F.</p>
Regarding TDR reporting requirements, there seems to be an inability to track gig workers. Any options for including that?	<p>ACF will match the SSNs with quarterly wage records in the National Directory of New Hires (NDNH) to obtain wage records and will use the matched results to compute the measures on behalf of states. We recognize that while the federal-level match with the NDNH has the benefit of reporting wages earned across state lines and from Federal employment, it does not include other sources of wage data such as self-employment or gig work in most states.</p> <p>States that are interested in calculating the work outcomes measures are encouraged to submit the Supplemental Work Outcomes Report annually. This report allows states to provide calculated outcome measures results with alternative data sources. The report will include documentation of data sources and methodology to assess validity and support ongoing learning and identification of best practices, including demonstrating the benefits of state-level data matching (potentially through State Wage Interchange Systems) and the addition of supplemental wage information, such as for those who are self-employed or participate in gig work and are not systematically captured in NDNH quarterly wage records. ACF is committed to providing technical assistance and support to states interested in developing their infrastructure to calculate work outcomes, including helping develop relationships across state agencies, data system modifications, data sharing agreements, and data analysis capacity.</p>

Questions	Answers
Will sample states be required to submit our entire caseload from this point forward?	<p>The calculations for the work outcomes measures use universe-level data, meaning that the rates are based on the entire population that meets the criteria and not a sample of that population. The TANF Work Outcomes Measures interim final rule includes three new reporting requirements:</p> <ul style="list-style-type: none"> • Work Outcomes of TANF Exiters Report (quarterly) • Secondary School Diploma or its Recognized Equivalent Rate (annually) • Supplemental Work Outcomes Report (annually) <p>For all three reports, states and territories are required to submit universe-level data. States that submit sample data for the TANF Data Report and the SSP-MOE Data Report may continue to do so.</p>
<p>When should we expect to see reporting instructions? AND The interim final rule takes effect October 1. When are the first submissions (for new reporting requirements) due?</p>	<p>The TANF Work Outcomes Measures Technical Resource hosted on OFA's TANF Provisions of the FRA 2023 resource page provides timelines for data collection and reporting periods.</p> <p>Report forms and instructions hosted as DRAFTS appear on OFA's TANF Provisions of the FRA 2023 resource page.</p>

Day 2: Wednesday, July 10, 2024

Connecting TANF Program Culture with Participant Experiences and Outcomes (Session 5) (9:15–10:30 a.m.)

Presenter	Affiliation
Asaph Glosser	Vice President of Strategy and Administration, MEF Associates
Nycole Tylka	Assistant Director, Utah Department of Workforce Services
Lorrie Briggs	Deputy Assistant Secretary for Workforce Development, Louisiana Department of Children and Family Services

Asaph Glosser summarized findings from the Office of Planning, Research, and Evaluation’s (OPRE) recent Office Culture Study. He shared 1) an overview and definition of organizational culture, 2) the impact of positive organizational culture on participant and staff experiences, and 3) key characteristics of positive organizational culture. Lorrie Briggs and Nycole Tylka shared personal reflections on their programs’ current culture and journey to shift and promote a positive organizational culture.

Key takeaways from presentations:

- Panelists shared that to shift organizational culture, programs need to focus on staff first. When programs invest in improving staff members’ experience, that models for staff how to improve program participants’ experience.

- Leadership teams modeling the behavior they want to see in staff is paramount.
- Panelists shared the importance of building psychological safety.
- Panelists reflected on disconnects between TANF direct services staff and TANF policy staff and the importance of cultivating a relationship between the two groups.

Areas of discussion and interest:

- Shifting organizational culture is especially challenging for county-administered programs because each county’s mission or values statements can differ.
- An attendee shared an acronym that resonated for others: **SERVE** - **S**tart with kindness, **E**ngage professionally, **R**espond with empathy, **V**alue every person, and **E**nd with hope.

Connecting TANF Program Policy and Practice with Participant Experiences and Outcomes (Session 6) (10:40 a.m.–12:30 p.m.)

Presenter	Affiliation
Tara LaMont	Program Specialist, Jefferson County Human Service Department in Colorado
Jeremy Ritchie	Workforce Advisor, Iowa Workforce Development
Bern Beck	Program Manager, Iowa Health and Human Services
Nycole Tylka	Assistant Director, Utah Department of Workforce Services
Michell Derr	CEO/Founder, The Adjacent Possible
Camille Wilson	Senior Associate, The Adjacent Possible

Camille Wilson led a human-centered design activity to help attendees brainstorm the needs of TANF participants across the following categories:

- Interactions with a coach or case manager
- Opportunities to improve their economic mobility
- Supports to families

Dr. Michelle Derr then gave a brief presentation about what TANF programs can do through policy and practice to address each of these areas. Panelists discussed ways in which their programs have worked to improve program quality and outcomes for families. Through a human-centered design activity, meeting attendees identified existing strengths of TANF programs in terms of supporting positive outcomes for families, challenges or areas of need, and opportunities for change, followed by a full-group report out.

Key takeaways from presentations and discussion:

- Jefferson County transitioned to a coaching model for engaging with TANF participants and the support needed to make coaching “stick.” For instance, many staff who were very direct with program participants thought that they were coaching effectively. The county trained program leaders in a coaching practice so that they could model the behavior for staff, safely offer feedback, and support staff as the program makes changes.

- Iowa did a statewide redesign of their TANF program, which included the adoption of a coaching model for engaging with participants. To reinforce behavioral changes in staff, Iowa changed staff performance criteria to align with the behaviors leadership would like to see from staff, rather than measuring staff's success using WPR. Bern Beck added that programs should *not* lead with sanctions but should instead center participant choice as a way of getting families on a path to economic mobility.
- The Utah legislature passed a bill that mandated performance pay for state employees, which shifted the TANF culture to focus on case reviews instead of outcomes for families. Now, Utah meets regularly with staff to talk through their cases and discuss ways to meet families where they are.
- Ohio adopted an approach of not leading with compliance, sanctions, or policies, and shifted their focus to supporting participants to get off of TANF through the things most important to them.

Areas of discussion and interest:

Small groups brainstormed the needs of TANF participants. Ideas included:

- Interactions with coach/case manager: autonomy of program participants, active listening, trust, hope, empathy, face-to-face connection, and coaching/mentoring.
- Opportunities to improve their economic mobility: building life skills, access to education/training, and tailored work experience opportunities.
- Supports to families: supportive services (such as housing, childcare, mental and physical health supports, food, transportation), referrals, support groups, and support for the entire family.

Effectively Implementing TANF Program Policies and Practices to Improve Participant Experiences and Outcomes (Session 7) (2:00–3:00 p.m.)

Presenter	Affiliation
Gerrie Cotter	Senior Policy Advisor, Ohio Department of Job and Family Services
Tara LaMont	Program Specialist, Jefferson County Human Service Department in Colorado

Tara LaMont and Gerrie Cotter reflected on their experiences implementing change in their TANF programs in Jefferson County and Ohio, respectively. Based on synthesized responses from the human-centered design activity from Session #6, meeting attendees identified barriers and facilitators to making changes in the following areas:

- Providing basic support for families
- Engaging the client's voice
- How we treat people
- Supporting change in leaders and staff
- Opportunities to improve economic mobility
- Data systems
- Structural barriers
- Program operations

Meeting attendees then identified which barriers are most critical to solve to make progress.

Key takeaways from presentations and discussion

- Panelists discussed the value of leadership casting a vision for their program and staff, supporting staff through implementation, and including participant voice in program changes. For instance, as Jefferson County first piloted its coaching practice, leadership shared participant feedback with staff so that staff could see how participants were experiencing the change.
- Panelists shared that clear communication about how a change benefits everyone supports buy-in of that change. Additionally, Gerrie Cotter mentioned that staff want to hear from one another, so Ohio leveraged a community of practice model to allow staff to share success stories and challenges and get advice.

Areas of discussion and interest

Small groups brainstormed the barriers and facilitators to making changes in their programs across four categories, summarized below.

Categories	Barriers	Facilitators
Providing basic support for families	<ul style="list-style-type: none"> ● Lack of funds ● Benefits cliff ● Lack of staff knowledge about program resources ● Lack of staff 	<ul style="list-style-type: none"> ● Program flexibility ● Administrator buy-in ● Creative funding streams ● Connection to community resources ● Federal mandate for minimum cash assistance payment to families
Engaging the client's voice	<ul style="list-style-type: none"> ● Support of leadership ● Old mindsets ● System not set up for two-way communication ● Lack of trust 	<ul style="list-style-type: none"> ● A guide for implementing a family voice council ● Staff with lived experience ● Space and time for long-term change ● Human-centered design activities
How we treat people	<ul style="list-style-type: none"> ● Prejudice ● Staff burnout, stress, and turnover ● Staff have their struggles 	<ul style="list-style-type: none"> ● Empathy ● Training for staff
Supporting change in leaders and staff	<ul style="list-style-type: none"> ● Closemindedness and resistance to change ● Staff turnover ● Fear of failure ● Authoritarian leadership style 	<ul style="list-style-type: none"> ● Change champions ● External pressure (e.g., lobbyists) ● Self-awareness ● Technical assistance ● Environment welcoming of staff feedback ● Workgroups to embrace new ideas

Day 3: Thursday, July 11, 2024

Now What? Planning Your Next Steps (Session 8) (9:15-10:15 am) and Now What? Peer-to-peer Feedback on Plans (Session 9) (10:30-11:30 am)

We received some feedback from meeting attendees about wanting more time to discuss the FRA and have 1:1 consultations with OFA. In lieu of the planned Sessions 8 and 9, Shaun Stevenson, Ella Gifford-Hawkins, and Camille Wilson facilitated an informal conversation with attendees to gather their reflections and questions about the FRA, including the pilots and reporting requirements. The questions attendees shared are included in the summary of Session 4: Innovating for Better Outcomes.

The planning team and OFA decided to shorten the last day and focus attendees' attention on planning the next steps following the meeting. Meeting attendees completed a concept poster with colleagues from their state that described what the group would act on after the meeting and how. They shared highlights from their concept posters with the full group. Then, meeting attendees could choose to meet with one another or OFA staff to further discuss their next steps.

Areas of discussion and interest:

- States enjoyed and appreciated the opportunity to plan, strategize, and get advice from one another about how to accomplish the goal drafted on their concept poster.
- Many states were interested in creating and managing a program family advisory council.
- Other states were interested in using program data better to make decisions.
- Meeting attendees offered advice and suggestions for how others could be successful in completing the goal they shared.
- Meeting attendees are interested in more opportunities to leverage peers from other states for advice and support during implementation.

III. Key themes

Through debriefs with the planning team and in the compilation of this summary report, several key themes emerged. We summarize these themes below.

- **Program leaders value opportunities to connect and share lessons learned.** Throughout the meeting, meeting attendees continued conversations after sessions ended. They scheduled lunch and dinner time with colleagues from other states to connect and support one another. Meeting attendees also appreciated their time to connect with OFA. Those who responded to the survey were very positive about their experience. Attendees reported that the meeting was a great opportunity to share their programs' bright spots, challenges, and opportunities. They also shared that their experience and the way the meeting was designed supported meaningful, collaborative exchanges and idea generation among their colleagues. In the survey, attendees shared appreciation for the time to connect with others at their table and a desire for more follow-up with peers.
- **Program leaders reported feeling empowered to include participant voices in program decisions.** During the lived experience panel and testimonial, attendees were engaged and asked questions. An attendee shared that their biggest "aha" moment was "to get feedback from program participants on

how to improve the program, and making their experience of feeling welcomed a priority.” During the concept poster exercise, at least five states set a goal to begin planning for an advisory council or gathering feedback from program participants. Meeting attendees shared that they found the panel discussion highlighting the Family Voice Council “valuable” and that it was “interesting to hear about all the creative ideas that states have to increase engagement and utilize lived experience to change processes.... The information on what Colorado has done with the voice council was impressive.” The theme of the meeting—including participant voices in program decisions—resonated with meeting attendees and prompted them to consider how they might gather feedback from participants about their experience in the program before and while making programmatic changes.