



Urban Partnerships for Welfare Reform: National Academy

Using Technology to Improve Service Delivery

Portland



Key Features

We believe TANF Program participants should have the opportunity to be *assessed, engaged, supported* and *held accountable* for their participation in a meaningful and timely manner. Holding participants accountable was an area of the program we needed to improve.

- **Accountability:** Participants who do not cooperate with their plans are to be “conciliated” within ten working days from the date non-cooperation is reported. If no “good cause” is found, a monetary penalty is applied. The Oregon TANF Program has 3 levels of penalty, applied in six steps of “disqualification”.
- To ensure EACH disqualification level is applied appropriately, a case manager must take *eight separate* actions, research previous disqualifications, and narrate all information on our TRACS data system.
- Disqualified participants may request to be re-engaged in the program at any time. If re-engaged participants don’t cooperate, the conciliation process starts over again - and if no-good cause is found, the next level of disqualification is applied.



Successful Strategies

- 75% of our participants did not attend their activities, but case managers were reluctant to pursue conciliation. As managers, we had had no way to track conciliation requests or gather statistical data needed to evaluate our process. By developing a database which captures the history of each disqualification in one place, *numerous staff hours have been saved, hearings are upheld, and engagement has increased. In addition, managers can track and analyze data by branch or by worker.*
- We utilized an *existing software system available to both agency and partner staff* to allow information to be shared electronically and actions to be taken timely.
- *By working collaboratively with agency and partner staff who have expertise in this technology, we avoided the need for funding.*



Surprises

- Case Managers were no longer reluctant to hold clients accountable for their non-cooperation.
- Participants were choosing to re-engage more quickly, and stay engaged, when they knew we would follow through with applying progressive disqualification penalties.
- Not only could we capture data, we found the database could streamline the conciliation process by assisting case managers in creating appointment letters, schedules, and capturing employment information.



Challenges and Replication Advice

- Once staff were trained on the database, they wanted to add more features. Had we implemented all suggestions, the final product would have been too complicated.
- Our suggestion: review a draft “concept” with as many potential users as possible before finalizing your program. Keep your goal in mind and your final product user-friendly.
- We tested the database in one branch, and then brought in data-support staff to implement it county-wide. The level of understanding varied so widely, some of the branches struggled to get the database up and running by our target date.

Our suggestion: identify and train key staff early in the development of your program.



Managing During Change

- The database was tested in a branch setting before the system was implemented county-wide.
- Agency and partner staff were involved in the development of the database and had ownership of the outcome.
- Several interactive training sessions were held to insure all appropriate staff were trained.



Visions for the Future

- Due to the success of the database in Portland, many of the features are being incorporated into the State-wide TRACS database system. As participants move around the State, their disqualification history will be readily accessible to their new case managers.