



THE WELFARE PEER TA NETWORK
Office of Family Assistance

Final Report

Peer TA Activity # 141

Conducted for the District of Columbia Department of Human Services

March 20, 2007

**“Identification of a Case Management System to Facilitate
TANF Program Tracking and Vendor Communication.”**

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FORUM BACKGROUND

Since implementing its Welfare Reform program in 1997, the District of Columbia's Department of Human Services (DHS), Income Maintenance Administration (IMA) has partnered with other District agencies and contracts with employment service providers (Vendors) that provide neighborhood based services to low-income families throughout the city.

DHS currently contracts with eight vendors to provide job readiness assistance to its welfare population. Because of the number of vendors serving District residents, IMA is burdened with aggregating participants' information from all of the vendors in an effort to determine actual attendance from program participants.

DHS currently contracts with an organization that built and maintains a data management system. IMA recommended, but did not require, all of its vendors to use the data management system. Some of the vendors elected to use the system and some elected to use their own proprietary system(s) to capture client data. DHS is unable to accurately track client participation or gauge the integrity of the data they receive from the vendors because the data provided is subject to several iterations of review before it is deemed appropriate.

DHS is interested in determining the viability of using a Web-enabled database management system to capture related client information and participation, and requiring all vendors to use the system. The proposed goal is to monitor all client time and attendance, vendor case notes, vendor assignments, and the length of time a client is in an active status with a particular vendor, using a system that is easily accessible and easily monitored.

DC has also expressed a desire to use a Web-enabled system to potentially capture data that may prove to be beneficial in responding to new Federal participation rate guidelines once they are released.

DHS' responsibilities for the administration of its TANF program include the following:

- Provide oversight of vendors who hold contracts to assist recipients prepare for, find, and retain employment;
- Determine who is required to participate in activities;
- Refer customers to work programs;
- Make final determinations about when sanctions should be applied for failure to comply with work activities;
- Provide notice of case actions; and
- Perform fair hearings and administrative review.

Vendor responsibilities include the following:

- Document receipt of client referrals;
- Engage clients in job readiness and job search activities;
- Track and document client attendance;
- Refer clients to other services such as child care or education;
- Provide monthly reports to DHS with documentation regarding client progress;
- Facilitate client transfers to other vendors; and
- Provide documentation to DHS to be used in fair hearings and administrative reviews.

The District of Columbia Department of Human Services (DHS), Income Maintenance Administration submitted a request to the Welfare Peer Technical Assistance (TA) Network for assistance in identifying a data management system capable of the following:

1. Web enabled for ease of use,
2. Capture all appropriate client participation information,
3. Produce reports, and
4. Cost effectiveness.

In response to the TA request from the District of Columbia, the Welfare Peer TA Network planned and implemented a Forum event that was held March 20, 2007 in Battleboro, North Carolina. North Carolina was identified as a state using a Web-enabled data management system known as Connectinc. that was capable of capturing the type of information the District of Columbia was seeking.

Connectinc. facilitated the meeting in which eight individuals representing the District of Columbia Department of Human Services, Connectinc. and the Welfare Peer TA Network were present. The Forum was designed to demonstrate the Connectinc. data tracking and management system and describe the benefits the system could provide to the District of Columbia.

The following report details the Forum event that was arranged to meet the needs articulated in the District of Columbia's request for technical assistance.

FORUM SESSIONS

A. INTRODUCTION TO CONNECTINC.

Connectinc. commenced operations in 2000 as the Work Central Career Advancement center to help TANF participants transition from welfare to self-sufficiency. After incorporating as a non-profit in 2002, Connectinc. expanded its mission of helping to foster networks of support for the region's TANF population to include addressing the needs of workers dislocated by the declining tobacco industry and the outsourcing of the textile industry.

Connectinc.'s programs are administered from a technologically-innovative call center. Utilizing software developed in-house, case managers devote nearly 100 percent of their time to supporting, connecting, and advocating for their customers. Electronic data management significantly reduced the burdens of documentation and reporting while improving the reliability and timeliness of both.

The Work Central Career Advancement Center addresses North Carolina's Work First mission, providing supportive services and skills training to Work First eligible families so that they can be ready for and enter into employment settings, become economically independent and self-sufficient, and provide for their children's well being.

Work Central provides technology-supported case management and resource information to assist former welfare clients as they find, keep, and move up in employment. Specific program objectives include: 1) finding employment opportunities for customers, 2) facilitating useful and relevant training and education, 3) linking employment candidates with prospective employers, 4) reducing obstacles to employment and job retention, and 5) promoting career advancement and asset accumulation.

At the core of the service is Connectinc.'s powerful network headquartered in Battleboro, N.C. and serving the following counties: Alamance, Alleghany, Ashe, Avery, Chowan, Edgecombe, Halifax, Martin, Mitchell, Nash, Scotland, Washington, Watauga, Wayne, Wilkes, Wilson, and Yancey. Relying on electronic information, communications, case management, and tracking systems, Work Central served over 6000 customers since January 2006, with only seven full-time and four part-time customer service representatives.

B. PROGRAM OUTCOMES

In the six years Connectinc. has been operating, they continue to maintain the dependable, reliable, customer driven values expected by clients, the Department of Social Services, and the State and County representatives.

Connectinc. program output included, but not limited to the following:

- Units of service doubled in 2006 from those attained in 2005 (Units of service include counseling over the telephone with customers, referrals to job opportunities and community resources, and resume preparation. The number does not include automated mailings such as letters of introduction or congratulation upon goal attainment, or VITA marketing and W-5 forms;
- Of the 975 customers who entered employment during the nine months for which 6 month retention data is available, 83 percent were still employed at the end of the 3rd quarter of 2006;
- Retention rates for customers working 12 months since February 2005 totaled 74 percent;
- Actual wages earned by Connectinc. customers who entered employment in 2006 was calculated at over 10.2 million; and
- Of the 1920 jobs filled by Work Central customers since January 1, 2006, 1719 were identified solely through their customer service representatives' networking.

Connectinc. values its relationship with its customers and continually strives to provide a fully integrated record of all customer transactions. Its electronic information system enriches, automates, and tracks case management activity in the delivery of human services. Designed to be a desktop aid, the system is powerful, flexible, and entirely user friendly. Some, but not all system benefits include:

- Imported customer information from external sources;
- Instantly verify service program information such as eligibility requirements and benefits;
- Search online policy and procedure manuals and departmental information;
- Generate new Word documents or email messages that automatically are directed to the customer; and
- Maintain an electronic To-Do List that automatically programs follow-up activities, prompts case managers to recall them, and prioritizes their performance.

“Connect Software maximizes both efficiency and accountability of case management. By automatically creating a continuous, real-time record of data

entered by all authorized users, while prompting follow-through and promoting efficiency in the performance of required tasks, it allows the agency to assure that no customer will fall through the cracks between programs and no procedural requirements will be overlooked.”

C. NEXT STEPS

The Forum conducted on behalf of District of Columbia staff and Welfare Peer TA staff was designed to provide a detailed description of Connectinc.'s functional capabilities as well as provide the support required to drive and maintain the system. The visit included a detailed history of Connectinc.'s origins, followed by one to one demonstrations of the system by Work Central representatives and Edgecombe County Department of Social Services case workers.

The District of Columbia's Income Maintenance Administration (IMA) representative, Ms. Nickleson, is tasked with determining the needs and resources of IMA and facilitating a plan of action based upon those needs.

The Welfare Peer TA Network was excited to have hosted this successful event and looks forward to continued collaboration opportunities with TANF professionals in the District of Columbia. Further materials related to this event and to Connectinc. are located on the Peer TA Web site, located at <http://peerta.acf.hhs.gov/>.

APPENDIX A:
AGENDA

**DC DEPARTMENT OF HUMAN SERVICES – SITE VISIT TO CONNECTINC.
Battleboro, North Carolina
March 20, 2007**

9:00 A.M.	Welcome and Introductions
9:15 A.M.	History of Connectinc.
9:30 A.M.	Demonstration of Work Central Connect Software
10:30 A.M.	Break
10:45 A.M.	Shadow Work Central Representatives
12:00 P.M.	Working Lunch
1:30 P.M.	Depart for Edgecombe County Department of Social Services
2:00 P.M.	Shadow Work First/TANF Social Workers
3:30 P.M.	Return to Connectinc.
4:00 P.M.	Debrief

APPENDIX B:
PARTICIPANT LIST

**DC Department of Human Services – Site Visit to Connectinc.
Battleboro, North Carolina
March 20, 2007**

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