



Agenda

Temporary Assistance for Needy Families (TANF)
Strategic Planning Steering Committee
October 15th, 2014

Location:

Holiday Inn-Ballroom
22 N Last Chance Gulch
Helena

Guests must have a parking pass in the windshield of their car (while parked in the Holiday Inn lot) during meetings held at the Holiday Inn Conference Center to avoid a city parking fine. One can obtain a pass from the desk clerk in the lobby.

- 9:00 Introductions
- 9:15 Discussion of TANF client survey final reports
- 9:45 Participatory decision making, finalizing TANF purpose and guiding principles, and criteria for strategic plan recommendations
- 10:15 Break
- 10:30 Facilitated fishbowl with contractors: Service delivery re-design
- 12:00 Working Lunch: Informal discussion-building assets and the limits of the TANF program (Bob Runkel)
- 1:00 Discussion: Recommendations for service delivery re-design
- 2:00 Facilitated exercise: Development of draft Strategic Plan Recommendations
- 4:30 Public Comment
- 5:00 Adjourn

Public Comment - In accordance with 2-3-103 (1), MCA, the Department will hold a public comment period. Please note that this is the public's opportunity to address the work of the TANF Strategic Planning Steering Committee.

Americans with Disabilities Act - The Department of Public Health and Human Services is committed to providing meeting access through reasonable accommodation under the Americans

Meeting Notes

TIME AGENDA ITEM

9:00 **Introductions**

- In attendance: Jamie Palagi, Therese Turner, Kelsen Young, Robert Runkel, Lesa Evers, Tanya Watson, Sandy Bailey, Mary Caferro, Heather O'Loughlin, Stephanie Wilkins, Katie Loveland, Ruby Benasky

9:15 **Discussion of TANF client survey final reports**

See the handouts "Steering committee 10-15" and "October 15th TANF Meeting"

- Non cash report will be replaced and packet resent out via email
- Summary presented of the findings of both the cash and noncash surveys and focus groups.
- Satisfaction
 - Cash-Satisfied, but felt weighted down by the requirements
- Cash focus groups
 - Transition from tribal to urban areas found it very difficult transitioning.
 - Culture issues
- Recap on non-cash survey
 - Surveyed only adult non-cash programs such as Adult Basic Education and Family Economic Security, not the child non-cash programs such as CASA or Big Brothers Big Sisters.
- Discussion
 - We added the question at the request of the committee: Why are you on TANF? A fairly significant number said it was due to job loss.
 - Questions from the committee: How recent was job loss, unemployment insurance looked at?
 - In the survey, there wasn't a follow up on the question
 - Jamie-Is there a discussion in the OPA regarding UI
 - Tanya Watson-Cash recipients are required to seek out any other benefits, explore UI. But there is no tracking on the ones that apply.
 - Surprised that there were so many that said they had insurance
 - Answers were from the paper survey, not the focus group
 - Mary stated she feels there are flaws in the data.
 - Kelsen-felt positive that we are on the right track in terms of what we are talking about and are heading in the right direction.
 - Heather-Is there a way to institute a process to capture this information ongoing?
 - As we move forward, we are going to need to put into place an extensive database in order to capture data that can be consistent across all programs.

9:45 **Participatory decision making, finalizing TANF purpose and guiding principles, and criteria for strategic plan recommendations**

See handout "TANF Strategic Plan Purpose and Guiding Principles DRAFT Updated"

- Consent-Outline what is on the table
 - Review purpose
 - Review guiding principles

- Discussion
 - Related to the purpose and guiding principles...The word poverty-consider finding an alternative phrase
 - Lesa-Reference to poverty, income is not included in purpose statement
 - Jamie-One of the concerns from the state perspective is to really get a sense of where does government (TANF Program) start and stop in terms of programs and services, is it FPL limits or programmatic limits, etc?
 - Kelsen-Families experiencing poverty may be a term to indicate an experience, not a definition of who they are.
 - Sandy-Poverty issue, is it going to connect it to the FPL? May limit who we can serve?
 - Mary-We need to think about what we should document, in case someone picks the plan up in the future and look at it as just FPL, and not up above the line.
 - Not always tied to finances, but need to find some limits.
 - Wording ideas: Families experiencing financial hardship throughout, prioritize, low or no income. Limited resources, families in need, financial insecurity, prioritize
 - Address the constraints, and not use “labeling” words.
 - Eligibility is determined by income levels.
 - What is the definition of low income? What do we mean by prioritizing the most resources?
 - How do you evaluate, and it is not clear. Need to prioritize, when speaking of switching resources to families with the greatest need.
 - Heather-Changing the wording feels generalized again; in these discussions we should make sure we prioritize those at the lowest income levels.
 - Mary-These are the families- 200% or below. Should be considered one, and not say one is more important over the other.
 - Jamie-Demonstrated on flip chart related to prioritization and resource distribution. For example, we are running numbers now related to what we believe was the number one recommendation from the committee, which is to increase eligibility and benefit levels for Cash clients (these are the lowest income). So, that policy change costs money which changes the distribution of available of funds within the set funding structure, thereby prioritizing resources on the cash clients first.
 - Stephanie-Maximum FPL income threshold is 250% child only grants. 200% FES, 185% is majority of non-cash, 30% FPL for TANF cash.
 - Kelsen-Would like to change the term of ‘client’.
 - Need to discuss it for consistency, since OPA uses client
 - Criteria for decision making
 - Providing direct assistance to participants (in guiding principles)
 - Understand consent, outline what needs to be decided, apply final decision rule, and implement
- Consent to adopting purpose statement, guiding principles with the caveat to go back and change the wording of #1.
 - Tabled until the end of day.

10:15 Break

10:30 Facilitated fishbowl with contractors: Service delivery re-design

- What does client driven means to you?
 - Help the participant become independent, work ready. Majority are not in that state, to keep it and know what will fit their personality.
 - Individualized, not having one size fits all programs.
 - Giving them the tools to succeed. Find out what is holding them back.
 - Giving the help to get the help, not jumping through the hoops.
 - Motivate participant, help their self-esteem.
 - Choice, menu of items so that you can meet them where they are. If they don't know what they want, have a meeting to see how we can help them.
 - Expand the choices WoRC has to offer
 - Flexibility to help clients to be as successful in meeting their needs.
 - More support for counseling to help participant. More allowable activities
 - Services should be customer focused; during period of assessment, address the barriers. Array of services they can choose, with the program or in the community.
 - Nimble, adaptable, to meet challenges
 - Serving the whole person/family.
 - Make sure the end is kept in mind. Where they are at today, where they are going be 5 years from now. Systemic, connect all needs to address, for an individual plan.
 - Connecting people through a liaison to services at the OPA level.
 - Allowing time to obtain goals
 - Meet today's needs, which are the short term goals.
 - Helping them learn to set goals. Assess the skills; give them understanding of what it means. Helping them know how to drive it.
- Client driving their future, how does that impact what you just said
 - They're lost. Find the resources to help get them where they need to go on their journey
 - Intake process streamlined so client feels they are working towards something.
 - Giving client a choice to participate in activities or not, especially the ones that only need that \$500 to pay their car payment. Frees up time.
 - Progressive economic security.
 - Workforce investment opportunity act- we need to be looking at the new changes and expectations, opportunities to work together
- Stop duplicating resources
 - Align resources in the communities
- How can we better serve the client
 - What do you want to do? Lifestyle desires? Where do you want to be? Determine way to get there, make a plan. Teach and help them understand what an employer will expect of them. Schooling, steer them to places that can help them get that.
 - Costs nothing to dream, costs everything to not dream. We try to help give them the dream.
 - Get their immediate needs met. Housing, expedited SNAP or TANF prior to authorization.
 - Transportation, bus passes, gas cards. Evening and weekends transportation help.

- Allowable activity before work experience for those that have no job experience. Soft skills to build up to a Work Experience site.
- Address the crisis, family stabilization for those where work is not the focus. Job readiness-goal driven.
- In two parent families-parenting classes involving maternal child welfare. When child care is scarce, one parent does child care, one parent works.
- Intensive case management for those that may be stuck in a place to set them up for success, before cash or non-cash payment.
- Use flexibility to get them services they need, utilizing community resources
- Allow participant to finish the schooling they need
- Solutions for remote areas. Go to the clients with transportation issues. The activity list needs to be specialized for their area. Expand supportive services, flexibility.
- Continuum, keeping the end in mind. Assessing the vision of the preferred future, and the current reality. The strategy you build is in between that. Financial stability is one stop along the path, working with them all the way through.
- Involve the families. Allow them to be part of the process, set goals, working towards larger sustainable goals.
- Streamlining eligibility, following examples of E&T models. Making it easy to co enroll in various programs.
- Serve the near eligible before they get to that cliff's edge. Create some engagement with those families to divert them to know where to start for serious help.
- Parents and teens help them through school. Setting long and short term goals.
- Do not overwhelm them with a big packet, meet their immediate need, and then start offering a menu of items.
- Work with community resources
 - Get transportation needs met even if unemployed.
 - Expand limits to receiving supportive services
 - Flexibility on how money is used
 - Housing
 - Accessing resources for those that are on a waiting list e.g. vocational rehab
 - Starting here, define communication mechanisms.
 - Start at the OPA; be prepared to expand the participant into the community.
 - List of resources throughout the community
- What if the money followed the person to access services, and their needs
 - Focus is on the means and not on the end. Focus on the end goal is client driven. Be proactive and not reactionary.
 - Feel it is respectful, as the person is planning their lives. Could be adjusted to size of family, lower middle class that they qualify for help the first time. Continuum could be applied to the concept.
 - Keep in mind what the mission is, financial independence. As long as it meets their needs as it follows them.
 - Could be a piece to help break the pattern for the young families and students during their classes learning to budget.
 - Parameters are needed along with rules on how they spend it.

- Upfront case management is still critical
- As an executive director, this scares me, I still have to pay my people
- What should a client's experience be?
 - Client led-allowing the client to lead to their future/outcome. Listen to their goals, along with stability goals. Funding for ongoing training self-care for case managers, to give participant the needs they deserve.
 - Get people the benefits, easy as possible without barriers to the benefits. Expanding assessment period, diversion program to meet the client where they are at.
 - Tiered system, barrier reduction-employment ready-education (post-secondary, secondary)
- What would it look like to meet people where they are at?
 - Keeping accountability a priority, directly related to their barriers
 - Time given for education
 - Parenting education
 - Co enrolled in programs can help meet the needs across the board
 - New to the system, other issues, more intensive case management. Accompany those that need it at their other appointments
- Broad support of services, what is reasonable
 - Still need to participate in activities, to earn the service provided. Client wants to do what they can to feel it wasn't just given to them.
 - Expand services that can be offered.
- Committee's opinions of the fishbowl experience.
 - It is clear the message that we have been hearing all along. People come in at different levels.
 - Helping those that maybe can help back, establishing pride.
 - Assessment period-expanding activities will that address the issue?
 - Expand the time to allow accessing child care, transportation, housing. 4 weeks is not enough time.
 - Expanding allowable activities, as well as assessment period.

12:00 Working Lunch: Informal discussion-building assets and the limits of the TANF program

Bob Runkel attended a national meeting sponsored by the Consumer and Financial Protection Bureau. There was a lot of discussion related to poverty and financial security. Bob shared his notes from the national forum.

1:00 Discussion: Recommendations for service delivery re-design

- Kelsen-There is a large gap between OPA and WoRC contractors. There is a need for an upfront person, a liaison, could be a new staff position. This seems more of building a system than meeting a need. Competing energies of building a bigger program, than creating flexibility. This vision keeps resonating; People are in one place, not having to travel all over town to get their needs met. Hospitable, place for children to occupy themselves. Accessing a card that all they have to do is show a card that they are eligible. Navigating all over the place seems dysfunctional. Hope we leave this space with some concrete ideas that will translate into some helpful action plans for the future.
 - Butte pays for the liaison through their contract. Knowledgeable of the programs.

- Jamie-Clearly there is a need for a coach, liaison, or navigator type person. How do you see it being designed?
- Lesa- I see a need to a longer stability period. Gas cards. Extending assessment period.
- Heather-Comfortable with the recommendation to allow greater span of activities to allow people to get where they need to go.

2:00 Facilitated exercise: Development of draft Strategic Plan Recommendations

See handout "DRAFT TANF Strategic Plan Recommendations"

- Kelsen-In general, stuck in this place of what is possible. Feels revolutionary, getting a sense of where the committee is at. Really having a hard time moving to edit, rather than what is the scope. Feels very different from what I think it could be to what it is. Without some significant changes, it won't make a big difference.
- Lesa Evers recommendations
 - Use TANF dollars to be more accessible, focused on participants.
 - Inter-county accessibility/help-allowing for client to utilize service and support across geographical boundaries if necessary.
 - Moving staff to a coach mentality.
 - Change work requirement for two parent household for birth of baby. Child care on reservations is non-existent and relying on extended family and limitations for assistance to those family members exists.
 - Before approval of TANF, is there flexibility for work requirement.
 - Keep cultural differences in mind.
 - Work around limitations in all communities
 - All staff should have cultural education
- Heather O'Loughlin
 - Presumptive eligibility-allow families to receive TANF support immediately
 - Individualized case management, meeting families where they are at.
 - Consideration of the family
 - Client should have credit if hours do not count towards work participation rate
 - Do Tribal leaders know that their communities are being treated differently when the community is receiving state TANF as opposed to tribal TANF?
 - Initiate discussions with tribes in administering their own programs.
 - Stephanie Wilkins-Six out of TANF operate a Tribal NEW program, 4 operate a Tribal TANF program. There are significant start-up costs which are a consideration to establishing infrastructure. The tribe would apply with the federal government to get approved.
- Mary Caferro
 - Prioritize the children, direct family support with goal of economic security. TANF families should be prioritized. TANF cash should be number one priority.
 - Meaningful activities with the goal of financial security. Use Maintenance of Effort
 - Increase income disregard
 - Co-location, person sitting in the OPA office to help provide information of other services.
 - Co-enrollment-encourage working together with Department of Labor to utilize some Employment & Training

- Cash support and working on their barriers, throw everything else out. If someone doesn't qualify for cash assistance, they need help in another area (e.g. sobriety).
- Sandy Bailey
 - 12 months exception for Parents of scholars allows 25 slots. I would want to increase those slots.
 - Pilot program, one stop shop.
 - Grandparents With Grandkids-currently raising kids informally with no support, current rule keeps them from seeking financial help. Only 18% are enrolled in TANF, and a barrier is the child support requirement.
 - It is a federal requirement to report to child support. So then we would have to find another way to serve them.
 - Older grandparents with a TANF family grant should be able to opt out of the work requirement.
 - Raise 2nd and 3rd child payment
 - Easier access to emergency funds.
 - Expand what can be counted in extension schools (e.g.SNAP Ed-nutrition classes)
- Bob Runkel
 - Hybrid of a case management structure in any kind of redesign of the system. Maybe is reimbursed by program type, but rather, looks at the whole of the family and their needs, community services both in and outside of government. Works closely with that family to wean them off the help they are receiving. Eventually will not be needed due to learning how to handle crisis, have an action plan, built an infrastructure for emergency situations through building of relationships.
 - Would need training, get some help from university related to the skill set needed for the individual helping the family. This person would need to be well trained.
 - Key core requirements
 - Work-creates stability, self-respect, confidence
- Tanya Watson
 - Office that can be a one stop shop.
 - Opportunity for a one-time payment, and not fill out a TANF application.
 - Immediate eligibility before application is processed
 - Eligibility should match other programs
 - Pay for performance, vs. sanctions
 - Consistency throughout state.
 - Work on limited access areas.
 - Housing
 - Child care accessibility
 - Allow cultural activities through other funding (MOE)
- Jamie Palagi-There are still questions. Our current service delivery is essentially all the programs we fund. Now how do we get to how should it be working? Where does TANF start and stop? I think we are closer to the debate about children vs. adults, as we focus on the needs of the family. How do we do the right thing for the people that come to us? Be creative, changes will be done over time.

3:50 Revisit the Purpose statement

- Kelsen-Feels it is a lofty statement
- Lesa does not feel we can move people into the sustainable financial independence. Looking for stability in the statement. What are the tools?
- Education, income, flexibility, supportive services where does that fit.
- Jamie-How do we make sure there is enough language to make sure we honor the intentions of this group and all that has been done.
- Heather-Like the fact that education is in it. Allowing people to go to school while they are on TANF. They will need to find a way to go. To use the time to improve education. Good emphasis on meeting the basic needs. At the end of the day, it has to be sustainable.
- Stephanie-Sustainable is a broad statement. Very different for each individual.
 - Take the word sustainable out
- Adopting the statement as it is stated.
 - All in favor
- Guiding principles-Discussion on splitting the first one into two.
 - 1-Provide direct services & supports to families experiencing financial hardship
 - 2-Prioritize resources to families eligible for the TANF cash program
 - Sandy-Last principle: Feels it is more of a process than an overarching principle. Maybe it should be directed to something/one specific
 - Bob-Feels it is fine. One of the problems we have is updating the TANF program in a thoughtful, consistent way.
 - Mary-Targeted to those in the decision making process.
 - NEW-Utilize a transparent, structured process when setting programmatic direction, prioritizing services that prove to be effective.
 - New principle-Develop a program that meets the needs of all Montana communities.
 - Balance in the consistency, and meeting the needs of what is going on at the local level.
 - Equally punitive, with consistent flexibility
 - Develop a program that successfully serves families in all Montana communities.

4:30 Public Comment

- Charley Briggs-Held a TANF contract in MT, 2009, wasn't working for the clients. Sizeable provider in ID for many years. Working Solutions. What seems relevant to this are the discussions of today. One on one assessment with each customer, skills, career start program. Life skills, web based classes every day of the week. Workshops teach what employers are looking for, how to improve themselves to get a well-paying job. Employers go to them looking for people. Mentor and coach, close engagement with business community, match employer needs with participants. High emphasis and value on the participant. Studies show a 6 month retention with ongoing support. Customers feel validated in their program.
- Marlene-Job Service Great Falls: One stop would work great at their location. Classes every day, parenting, counseling, interviewing classes, practices, applications, resumes. Part of their process to do the next step. It should be a requirement to go to Job Service.
- Nanette Gilbertson, Big Brother Big Sisters-Would encourage the program still moves forward to work with children of the families so they are not experiencing the same issues as they age. Best practices combine mentoring with life skills. BBBS is a program that really works. Every kid

benefits from a mentor who is with them once a week to show them things that they have never experienced.

- Bobbi, HRDC, Billings-Service delivery, WoRC program-is missing the flexibility. The rest of the pieces are in place. Assessment period-a way for the state to allow barrier reduction. Expanding the time that people are allowed to address barriers, to work to what is next. First point of contact-not sure stationing someone in the OPA office is necessary for the big picture. Activities-don't put limits on what is allowable. See what they need and go from there.
- Kelly Deninger, Job Service- 6 month sanctions are too long. Education isn't the "be all for everyone". Apprenticeship or what the customer is interested in doing.
- Tom Jacobson, Rural Dynamics-On the debate on sustainable-it can be defined. Make sure people have jobs without the use of public assistance. Setting sights too short of sustainable, people can fall into a trap. Financial independence = long term goal. Short term = financially stable. It all needs to be addressed and worked on. Identify values, efficiency (one stop shop works), data driven, client focus, incentive based. The committee and department is doing a good job at working through these challenges and strategic planning process.
- Vicky, WoRC Great Falls-Agrees 6 month sanction is too long. Self-sufficiency is the goal. In general, people work to get paid; it should be that way for TANF too, which it is. Meet the immediate needs. Then after a certain period of time they get paid after they do their activities. We would be hurting participants by paying first, and then get activities. Learn how to work in the world to be successful.
- Pam Carlson-Career training institute; TANF was developed that someone did something to get money. Through the years creating and E&T piece has done a good job. People come on TANF because they want money. Let's make sure the stuff we are asking people to do is worthwhile and will move them to that sustainable piece.

4:50 Adjourn