



2011
**TANF FAITH-BASED AND COMMUNITY
ORGANIZATIONS INITIATIVE**

TANF Faith-Based and Community
Partnerships Collaboration Institute

Final Report



Acknowledgements

The TANF Faith-Based Community Partnerships Collaboration Institute is conducted under a contract with the Administration of Children and Families, Office of Family Assistance (OFA) (Task Order #HHSP23337011T, Contract #HHSP23320095636WC). This four-year effort has been lead by OFA Federal Project Officer Al Fleming.

2011 TANF/FBCO Collaboration Institutes: Executive Summary

Background

- The short-term goal of the institute series was to increase collaboration of Temporary Assistance to Needy Families (TANF) agencies by leveraging existing community resources to help low-income participants attain economic self-sufficiency.
- The long-term goal of the initiative was to design a blueprint for developing strategic public-private partnerships that maximize existing resources while more effectively and efficiently moving families to self-sufficiency.
- Five institutes were facilitated in conjunction with the regional Technical Assistance (TA) meetings and 30-day follow-up calls were held with small “partner groups” from each State or Territory, consisting of the State or Territory TANF director, a local TANF agency leader, and one or two faith-based or community organization (FBCO) leaders. A structured curriculum was developed based on findings from the field and included the following sections:
 - The Importance of Volunteers
 - Organizational Infrastructure
 - Inter-agency Communication
 - Action Planning

Level of Participation:

- 153 Regional, State and Territory TANF Directors, Local TANF Representatives and Community Partners attended Collaboration Institutes.
- 40 states and territories, including Guam, the Virgin Islands and District of Columbia; and all 10 Department of Health and Human Services (HHS) Regions were represented.

Evaluation Feedback:

- Approximately 91.8 percent of Collaboration Institute participants felt that the information provided would be beneficial to their work and 91 percent would recommend this event to other TANF/FBCO groups wanting to collaborate.
- Participants consistently liked the Action Planning, Importance of Volunteers, and Organizational Infrastructure activities.
- Participants also indicated that they appreciated the chance to network with other state and local agencies around strategies for creating and maintaining partnerships.

In addition to participant evaluations, individuals completed self-assessments to assist in developing baseline data for determining collaborative readiness.

TANF Collaboration Readiness Assessment Findings:

- The average Collaboration Assessment Readiness score for local TANF programs was 57 out of 80.

- Approximately 67.2 percent of respondents indicated the TANF agency director is open to change as it relates to process improvement.
- Approximately 13.1 percent felt their organization develops sufficient staffing capacity to support new collaborative ventures.
- Approximately 21.3 percent of respondents included pursuit of grant funding opportunities with community partners as a key partnership activity.

FBCO Organizational Self-Assessment

- A baseline score of 48 out of a maximum possible score of 63 reflects that the majority of the FBCOs with existing partnerships have some level of organizational capacity to partner.
- Eighty-three percent of respondents indicated having seven or more of the processes and policies suggested as important to *Board Governance*.
- Categories related to *Human Resources Administration* and *Legal Concerns* also had high levels of affirmative responses indicating more formal infrastructures and therefore favorable conditions for partnership.

Thirty-Day Follow-up:

- Virtually all participants interviewed reported that they have shared key findings from the Collaboration Institute with their staff teams, including both supervisors and staff.
- Numerous participants appreciated for the flash drive “list of tools, resources and products” they could use in their own communities.
- Some asked if they could receive local technical assistance—or host a local-level Collaboration Institute training meeting.

Examples of Successful Implementation of Action Plans:

- A local TANF office in Chicago returned from the Collaboration Institute to reach out to a local hospital and several community-based organizations within their township.
- In one locality, a *community hospital* joined a regular monthly call to develop future collaboration, and a new Head Start agency was scheduled to join the group for a meeting next month. (These monthly calls serve as the basis for local collaborations that involve co-sponsored service opportunities, work placement sharing, and other events.) The hospital has an existing TANF work placement population they serve, so they were a natural “win-win” partner for the State’s Human Capital Development program.
- In several other settings, volunteers began working in a local TANF office, using the Collaboration Institute’s template as a model. In some cases the volunteers are university students. Many volunteers underwent the kinds of *background checks* described during the Collaboration Institute, making it easy for community-based programs and TANF staff to feel at ease in working with them.
- Another participant described how she has reached out to Senior Corps to ask for their involvement in supporting senior citizens in collaboration with local congregations.

- A local office has built a new program allowing TANF participants to volunteer in their organization as a “stepping stone” to permanent employment.
- Two TANF agencies have developed a new Memorandum of Understanding (MOU) that they now require their new FBCO partners to sign before officially becoming partners.
- In Ohio, the Governor’s Office of Faith-Based and Neighborhood Partnerships participated in the Collaboration Institute and subsequently sent its director to meet with a local TANF Director about the Institute. Their office team is currently deepening a large list of FBCOs throughout the State that can serve to support wide-ranging partnerships.
- Numerous other participants have reached out to the *Corporation for National and Community Service* to explore a possible “place-based strategic partnership” specific to local lowest-income communities. One Minnesota TANF office drew in an AmeriCorps VISTA volunteer to support non-custodial fathers and encourage TANF participants in their work requirements.

Overall Insights and Recommendations:

- The Collaboration Institutes were successful in creating an environment that nurtured and equipped public-private partnerships focused on increasing family self-sufficiency. One aspect of the institutes that may have aided in that success was the idea of thirty-day follow-up calls which provided a soft-accountability. The Institutes also helped expand the definition of “partnership”. Many TANF agencies used the term strictly to refer to agencies receiving funding to support TANF efforts.
- Based on self-assessment scores TANF leaders recognized there is much room for improvement related to collaboration with community partners including acknowledging that the current culture does not offer sufficient staffing capacity to support new collaborative ventures. There is also a significant opportunity to encourage pursuit of funding that can support collaborative partner efforts.
- This partner-group meeting concept may be applicable to other public-private partnership efforts such as Healthy Marriage and Responsible Fatherhood grantees who are encouraged to collaborate with safety-net stakeholders such as child welfare or Office of Child Support. Other federal initiatives such as Head Start or Department of Health and Human Services (HHS) asset-building initiatives may be another good opportunity to encourage collaboration.

This is especially true given that through the Institutes, we learned that there is a lack of knowledge related to other federal initiatives and/or community resources that can be leveraged to build capacity without budgetary impact. AmeriCorps, Bank-On, and other federally supported efforts could be linked to TANF agencies through technical assistance or other integration efforts to link initiatives.

- The Collaboration Institutes, the activities and assessment tools from the event may be used by TANF agencies for organizational development. For example, the FBCO assessment tool could be used by TANF agencies in screening potential FBCO partners. The TANF Collaborative Readiness tool could be used internally by TANF directors to identify barriers to collaboration. The Partnership Development form and Action Planning template can be used as staff tools for thinking through potential partnerships.

FINAL REPORT

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2011 TANF/ FBCO Collaboration Initiative Final Report

Background

The 2011 Collaboration Institute series is the final phase of the Temporary Assistance for Needy Families / Faith-based and Community Organizations (TANF/FBCO) Collaboration Initiative's research-to-practice design. The Institutes create an incubated learning environment to apply the collaboration concepts learned in the early phases of the project in an effort to strengthen existing and newly formed partnerships. The overall TANF/FBCO Initiative consisted of the following four phases:

- Phase 1: *Data-collection* (2007-08)
- Phase 2: *Refined analysis* (2008-09)
- Phase 3: *Site visits* (2009-10)
- Phase 4: *Research-to-Practice Training* (2010-11).

Starting with a review of partnerships associated with 139 social service agencies having relationships with TANF Agencies and/or One-Stop Career Centers; the project narrowed its focus to 23 partner groups; then eight that reflected diverse approaches with strong partnerships as a central component.

- **Appendix A** includes descriptions of the deliverables related to each of these phases.
- **Appendix B** offers a visual of the processes and methodology used to select partner groups for analysis and define collaborative readiness factors.
- **Appendix C** provides region specific information related to each Collaboration Institute including participant data, evaluation feedback, and 30-day follow-up calls.
- **Appendix D** contains the Collaboration Institute curriculum which includes the activities and organizational self-assessment tools.
- **Appendix E** provides a list of the activities, tools and resources provided on flash drives to participants who attended the Collaboration Institutes.

Collaboration Institute Results

During Summer and Fall 2011, five Collaboration Institute trainings were hosted around the country in conjunction with the Office of Family Assistance (OFA) Regional Technical Assistance (TA) Roundtables/Workshops. The purpose of these Collaboration Institutes was to facilitate a hands-on learning experience for groups of 25-40 TANF leaders and local FBCO practitioners with whom they had some relationship, to develop existing collaboration or promote new cooperation between TANF agencies and their community partners. In each case, partnerships focused on more effectively supporting TANF or TANF-eligible participants.

The project developed a comprehensive structured curriculum designed to provide tools to identify and address opportunities to strengthen collaboration as identified through the earlier research. During the one-day **Collaboration Institute**, TANF officials invited a partnering community-based organization with which their agency was working—and while the

partnerships ranged in their levels of maturity, in each case the partner groups concluded their participation in the Collaboration Institute by developing an action plan. Training was intended to lead to increased partnership and cooperation on behalf of TANF participants or TANF-eligible families—and 30 days after each training, the project team followed up with a series of follow-up phone calls to identify what had taken place, and what remained to be done.

Participation Levels

A total of 153 attendees participated in the five Collaboration Institutes. These participants represented 40 states and territories, including Guam, the Virgin Islands and the District of Columbia. All ten Department of Health and Human Services (HHS) Regions were represented, and were from State and local TANF offices, FBCO, along with other state entities. The Collaboration Institute participation map (Exhibit 1) illustrates levels of involvement by each State and Territory, and a complete list showing all organizations and public agencies **by Region** is included in **Appendix C**. In addition to cataloguing organizations that took part in these meetings, the set of Regional participation maps offer a useful window on the overall receptivity to TANF-FBCO collaboration in different parts of the country.

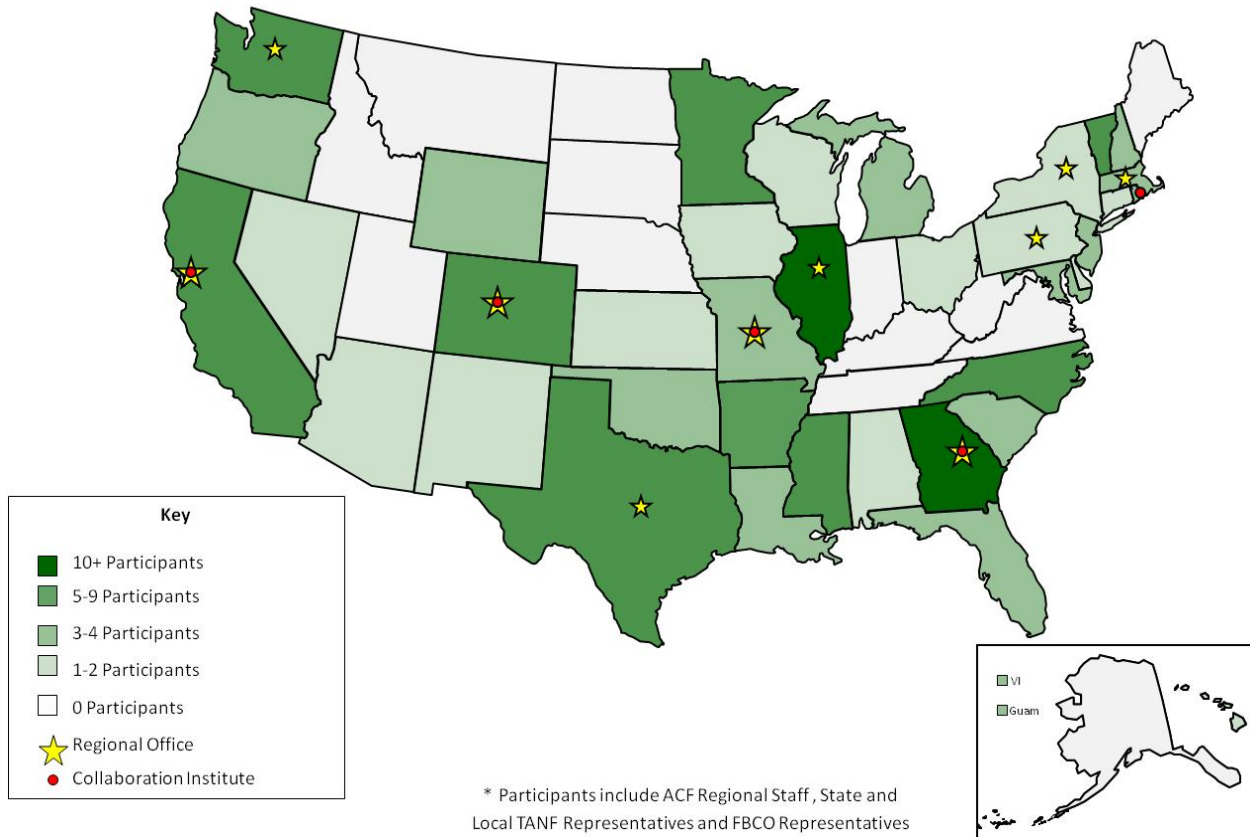
Evaluation Feedback

At the conclusion of each of the Collaboration Institutes, participants were asked to complete an evaluation rating the usefulness of each section of the curriculum. They also received a flash drive containing all the materials from the Collaboration Institute, as well as additional useful tools and resources and were encouraged to share these resources with other staff. A list of the resources is available in **Appendix E**. All participants were also given the opportunity to provide individual feedback. The forms allowed participants to identify particularly favorable sections of the curriculum and offer suggestions for program improvement.

The evaluations revealed that 91.8 percent of all participants agreed that the Collaboration Institute provided information that would be beneficial to their daily work. Ninety-one percent reported that they would recommend the Institute to other TANF or FBCO groups wanting to collaborate.

Exhibit 1: Collaboration Institute Participant Map

Collaboration Institute Participants* By State or Territory



Perhaps because it provided an opportunity for participants to put their observations into context-specific plans, the Action Planning section of the curriculum was consistently the most popular part of the Collaboration Institutes. About 86.4 percent of participants indicated that the activities in this section allowed them to understand the concepts related to community asset-mapping and action-planning. The evaluations also suggested these activities were helpful to the participants own goals. In the free response section of the evaluation, participants noted that they appreciated in particular the interactive activities, since they encouraged participants to think about community impact and outcomes more directly. Participants also indicated appreciation for hearing from outside groups, particularly when collaborations by others sparked ideas that could translate into their own context.

Slightly less popular sections included the sessions on inter-agency partnership, organization infrastructure and, in some meetings, the importance of volunteers. While on average more than 75 percent of participants still found these sessions useful, some commented that certain aspects were too elementary for their own levels of experience, and thereby were less pertinent to their organizations. On the other hand, others in the room felt these same sessions were immensely useful, showing the range of organizational maturity levels—particularly on the FBCO side—that were involved in these trainings.

Additionally, the first Collaboration Institute (in Kansas City, Missouri) received slightly lower evaluations scores than the others with an overall score of 88.5 percent indicating the event will be beneficial to their work. The project team took constructive feedback from Kansas City participants to adjust or restructure several sections of the curriculum presentations. With those adjustments, evaluation scores in all four subsequent meetings were higher with an average overall score of 93.6 percent of participants indicating participation in the event will be beneficial to their work. One idea implemented based on this feedback was to allow more time for sharing. Future events offered a dedicated time for state-wide group presentations about effective partnerships. Moreover, participants generally preferred meetings that came prior to the Regional Roundtable/Workshop—rather than holding the Collaboration Institutes over a split-day at the end of the OFA TTA Regional meetings (as occurred in Kansas City and Providence). Collaboration Institutes split across two days were generally less favorable, perhaps due to starting midday immediately following the Regional meeting, travel fatigue, or other obligations mounting from work or the training itself.

In short, the evaluation feedback showed a high degree of appreciation for the project’s overall goals, and the particulars of the Collaboration Institute’s training. Participants were highly engaged and, as they demonstrated in the 30-day follow-up calls that followed each meeting, they felt these collaboration lessons “went beyond a typical training,” introducing them to key national resources, providing them with tools they could use in their own organizations, and recommending practices to leverage existing community resources on behalf of low-income families.

Self-Assessments

In addition to their evaluation, each participant also completed an organizational self-assessment as part of the Collaboration Institute’s *Organizational Infrastructure* break-out session (one for TANF officials, another for community leaders). The research conducted during the first three phases of the project concluded that TANF collaboration readiness and FBCO organizational infrastructure play a significant role in the FBCO’s ability to successfully collaborate with TANF agencies. With that in mind, the assessment tool for TANF agencies focused on collaboration readiness factors within three categories:

- 1. TANF Agency Director** - including statements directly related to organizational leadership and their openness to change, ability to communicate and inspire trust; willingness to share responsibility for success, etc.
- 2. Organizational Culture** - assesses if the internal culture fosters open communication, encourages new ideas, develops staff capacity to support new ventures, etc.
- 3. Current Community Partnership Activities** - focuses on existing community relationships; are they part of the strategic plan, do they include formal agreements, do they share resources or partner to pursue funding, etc.

The tool was designed to allow TANF Agency directors to self-assess their organization and assist in establishing a baseline for readiness factors by TANF Directors who already have some

level of partnership in their community. Using a 4-point scale, TANF staff selected *Agree (4)*, *Somewhat Agree (3)*, *Don't Know (0)*, *Somewhat Disagree (2)* and *Disagree (1)* to a series of statements within each of the categories. A review of the assessments completed by TANF staff presented an average score of 57 out of a potential 80.

An initial reaction to the data is that; staff gave themselves and their agencies high marks in the readiness factors. The section related to **TANF Agency Directors** generated the highest positive response with 83.3 percent of respondents indicating *Agree* and *Somewhat Agree*, followed by **Organizational Culture** and **Community Partnership Activities** where 70.5 percent of respondents in each category responded positively. An interesting observation is that while overall the scores are positive, other than the **Agency Director** category, a larger percentage of the staff indicated only *Somewhat Agree* - not *Agree*. This sends a clear message that while they feel their agency is on the right track, they acknowledge there is room for improvement.

Looking at specific statements within the three categories, here are some other interesting findings:

- **TANF Agency Director** - 67.2 percent indicate having/being a director who is open to change as it relates to process improvement.
- **Organizational Culture** - 13.1 percent feel the organization develops sufficient staffing capacity to support new collaborative ventures.
- **Community Partnership Activities** - 21.3 percent include pursuit of grant funding opportunities with community partners.

These findings support our research that TANF agency leadership is one of the key components of collaboration, and even in environments where the leadership is open to collaboration; there can be internal paradigms that may be limiting success.

Just as the Collaboration Readiness Assessment offered insights related to the TANF Agencies, the Organizational Self-Assessment provided insights related to FBCOs and their comprehensiveness in ten core infrastructure areas:

- | | |
|-----------------------------------|--------------------------------------|
| 1. Board Governance | 6. Retention of Records |
| 2. Human Resources Administration | 7. Insurance |
| 3. Volunteer Management | 8. Transportation |
| 4. Audits and Records | 9. Equipment and Physical Facilities |
| 5. Purchasing | 10. Legal Concerns |

The assessment tool is not intended to evaluate agencies, but designed to collect baseline information. As seen in the Exhibit 2, the tool allows FBCO leadership to indicate *Yes*, *No* or *N/A* to a series of statements related to the ten core areas.

Exhibit 2: Sample Assessment Tool Question

V. Purchasing	Yes	No	N/A
28. Agency has purchasing policies and procedures, which, at a minimum, prohibit agency purchase of any service or product from an employee or any company in which an employee has a financial interest or could gain from personally, unless approved by the board.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

By collecting and analyzing data related to FBCOs that already have partnerships with varying degrees of sophistication; we hope to learn more about the specific aspects of infrastructure that may contribute to the success of those partnerships.

In reviewing the assessments completed by the community partners attending the Collaboration Institutes, we determined a baseline score of 48 out of a maximum possible **Yes** score of 63. While a score of 63 is possible, it is not likely as not every statement in every category applies to every organization. For example, **Category 7 Insurance** - most FBCOs would mark "yes" indicating they have liability insurance, but only agencies serving children would be expected to mark "yes" for the subcategory of *molestation insurance*.

The baseline score reflects that the majority of the FBCOs with existing partnerships have some level of sophistication. The category having the highest level of response was the **Board Governance** category with 83 percent of agencies responding affirmatively to seven or more of the subcategories. While not as high, Human **Resources Administration** and **Legal Concerns** also had high levels of affirmative responses.

Another interesting trend was that there appeared to be a direct correlation between high scores in **Board Governance** and an overall high score. Conversely, agencies with low scores in **Board Governance** trended low across the category spectrum, in some cases reflecting an overall score as low as 22. The trend would suggest that FBCOs with strong policies and procedures related to board governance tend to be stronger across infrastructural categories.

Again, these assessments were completed by TANF agencies and FBCOs already engaging in some level of collaboration.

Findings from 30-Day Follow-up Calls

Following each Collaboration Institute, a project team scheduled a conference call with each participating state partner group including both the local TANF official and their community partner, whenever possible. The calls gathered feedback for each of the following questions:

- *Have you shared your action plan with other members of your staff?*
- *Have you discussed your action plan with other organizations?*

- *Have you met in person or convened a call with your FBCO partner? (Or for the FBCO, have you followed up with your partnering TANF agency?)*
- *What were the three leading elements of your action plan?*
- *What changes, if any, have you made vis-à-vis volunteer management? What changes do you plan to make?*
- *What changes, if any, have you made regarding inter-agency partnership or communication? What are you planning in this area?*
- *What broader changes, if any, have you made as a result of the Collaboration Institute? Are you doing anything in terms of organizational development or cross-sector outreach?*
- *Now that you have been back in your local community for a month, what additional recommendations or reflections do you have regarding the Collaboration Institute?*
- *What additional technical assistance or other supports would be helpful to you, as you and your colleagues implement these changes and new partnerships in your community?*

Overall Feedback

Data gathered from these calls showed that many participants took seriously their commitments to integrate learning from the Collaboration Institute—particularly within *local* communities. A disproportionately high percentage of local TANF leaders and local FBCOs did participate in these calls. In many cases, they shared that they often had implemented the initial contours of their plans, forging new relationships with volunteers or faith-based organizations. Often, they expressed satisfaction with having implemented the first part of their plan, and intent to follow-up on the unfinished part. Numerous participants spoke to their appreciation for the flash drive “list of tools, resources and products” they could use in their own communities. Some asked if they could receive local technical assistance—or host a local-level Collaboration Institute training meeting. Many said they would appreciate an additional follow-up call in the future.

Action Plan Implementation

Virtually *all participants interviewed reported that they have shared key findings* from the Collaboration Institute with their staff teams, including both supervisors and staff. In most cases, this meant reporting a new insight or possible outreach strategy vis-à-vis the use of *volunteers*, the value of general FBCO outreach by the TANF office, or cultivating *inter-agency strategic “win-win” partnerships* to stretch organizations beyond their previous patterns. Specific timetables were not always fully adhered to, sometimes due to personnel changes or summer vacation schedules, but all five TANF-FBCO partnerships had made at least incremental progress in forging or deepening partnerships, as described in their work plans.

A local TANF office in Chicago, for example, returned from the Collaboration Institute to reach out to a local hospital and several community-based organizations within their township. In one locality, a *community hospital* joined a regular monthly call to develop future collaboration, and a *new Head Start agency* was scheduled to join the group for a meeting next month. (These monthly calls serve as the basis for local collaborations that involve co-sponsored

service opportunities, work placement sharing, and other events.) The hospital has an existing TANF work placement population they serve, so they were a natural “win-win” partner for the State’s Human Capital Development program.

Elsewhere, under the leadership of a local TANF program partnership, a congregation-based partner that supports mothers and infants in practical ways began collaborating with *another church’s food bank*. Clearly, a variety of new organizational partnerships emerged as a result of participants hearing about the value of win-win collaborations and strategic outreach to FBCOs in the community.

In Illinois, the Executive Director of the Calumet Township’s Community Center described how a Collaboration Institute presentation about a “comprehensive database of state contractors” inspired her to begin building the same kind of *database*. As a result, she is working with the Chamber of Commerce and a city representative to build an *online Web site that hosts a comprehensive community asset map*.

In several other settings, *volunteers began working in a local TANF office*, using the Collaboration Institute’s template as a model. In some cases the volunteers are university students. Many volunteers underwent the kinds of *background checks* described during the Collaboration Institute, making it easy for community-based programs and TANF staff to feel at ease in working with them. Another participant described how she has reached out to Senior Corps to ask for their involvement in supporting senior citizens in collaboration with local congregations. Numerous participants noted their unanticipated appreciation for the presentation on volunteering

In Ohio, the Governor’s Office of Faith-Based and Neighborhood Partnerships participated in the Collaboration Institute and subsequently sent its director to meet with a local TANF Director about the Institute. Their office team is currently deepening a large list of FBCOs throughout the State that can serve to support wide-ranging partnerships. Numerous other participants have reached out to the *Corporation for National and Community Service* to explore a possible “place-based strategic partnership” specific to local lowest-income communities.

Congregations and businesses also played key roles as partners—sometimes in unexpected ways. In Little Rock, for example, one community partner reported that because of her action plan she immediately reached out beyond the organization’s traditional volunteer base (congregations) to a pair of *businesses*, which—surprisingly to them—generated 10 new volunteers within the first two weeks. Those volunteers are now supporting recent TANF participants who have obtained jobs and are working in Texas to assist them in their transition.

Other participants worked with the Collaboration Institute’s volunteer facilitator to contact the local chapter of the Hands-on Network or Corporation for National and Community Service, resulting in new partnerships or assigned staff from AmeriCorps Vista. Several TANF agencies shared this strategy with their agency directors, and some planned to reach out to a local

Hands-On Network chapter. Elsewhere, to recruit new volunteers one community-based partner contacted a local radio station, which is now helping them communicate its mission in order to draw in new support from local faith-based congregations.

Several TANF agencies have implemented efforts related to volunteer management and use of volunteers. In one city, for example, one local TANF office has built a new program allowing TANF participants to volunteer in their organization as a “stepping stone” to permanent employment. Another TANF agency recruited a high school and college student to support filing and other relational work on Tuesdays and Thursdays. One Minnesota TANF office drew in an AmeriCorps VISTA volunteer to support non-custodial fathers and encourage TANF participants in their work requirements.

Other changes have come in the form of deepening inter-agency communication. Two TANF agencies have developed a new Memorandum of Understanding (MOU) that they now require their new FBCO partners to sign before officially becoming partners. In articulating written goals of different organizations, “we try hard not to recreate a wheel that’s already in place,” a local TANF office director described. Similarly, another partner described how more precise written communication clarifies “what they give, and what we give, and specifically how we can both benefit.”

A statewide Benefit Bank is working to reach out to “citizen needs where they live, work, eat and pray,” as their literature describes, and it can only do so when wide-ranging grassroots partners communicate the availability of the Benefit Bank’s resources in these diverse settings. Finally, for TANF agencies and other public organizations asked to provide the same level of services with less money or statewide reductions, “Sometimes budget cuts - as tough as they are - open doors to new partnering organizations.”

Based on participant presentations during Collaboration Institutes and 30-day follow-up calls, the Exhibit 3 shows the wide range of TANF-FBCO collaborations that are working on behalf of low-income families. In addition to summarizing the organizational partners and basic purpose of the partnership, it also summarizes successes and remaining challenges in successfully implementing collaborative efforts.

Exhibit 3: 2011 TANF/FBCO Partnerships

Partnership Organizations	Purpose	Successes and Challenges
Arizona Department of Economic Security and associated health/community partners	A broad partnership with local programs that asks FBCOs to expedite benefit application process.	Broad embrace of opportunity to connect participants to TANF program, but some reticence by community partners to fully connect community members to public benefits and programs.
Arkansas Department of Workforce Services and Our House, Inc.	With 2-year grant, Our House staff and volunteers support homeless needs, including job-training, counseling, etc. and report to its DWS partner.	Uncertain of sustainability beyond grant cycle, though informal collaboration will continue.
Baltimore Department of Social Services and Maryland Food Bank FoodWorks Program	To promote “customized training” for DSS temporary cash assistance in partnership with food bank recipients and Morgan State University.	Starting wages for participating TANF participants is \$13 per hour, with a very bright future. Alternatively, in the program’s early years, many TANF participants have dropped out of training.
Florida Department of Children and Families and Harvest and Community Food & Outreach Center	Since these two organizations share a lobby, the DCF Access Florida can refer TANF participants directly to this community-based emergency food/supplies provider.	Strategic geographic location expands variety of services available. On the other hand, only a highly select group of Workforce participants are required to participate in the Harvest Center’s job-training and education, which means only one principal element of their supports are utilized by the partnership.
Guam Department of Public Health and Social Services, Catholic Social Services, One-Stop and Guam Community College	The partnership promotes “interrelated access” to wide-ranging client supports, drawing upon multiple funding sources.	With One-Stop infrastructure, TANF participants appreciate benefits but cannot all participate; information-sharing helps case managers but is incomplete; and MOUs clarify responsibilities but bureaucratic challenges remain.
Hawaii Child & Family Services with Goodwill, Boys & Girls Clubs, Catholic Charities, YWCA, BBBS, etc.	Broad collaboration to help fill gap of needed services not provided by local government programs.	Despite ongoing demands for services, partnership has allowed Hawaii to meet Work Participation rates and increase job placement opportunities.
Louisiana Department of Children and Family Services and its area food banks, FBCOs and One-Stop Career Centers	Partnership initiated by DCFS to “broaden applications to DCFS for services” and provide for participant needs.	Breadth of partnership makes it difficult to carefully track program outcomes from collaboration.
North Carolina Department of Human Services, Department of Social Services and Housing for New Hope/Urban Ministries of Durham	Partnership draws upon community-wide and congregational goodwill, to support housing for homeless TANF-eligible families needing a place to stay.	Has successfully re-housed 110 households, but funding is set to soon expire, and MOU required more paperwork than initially anticipated by the two FBCO partners.

Partnership Organizations	Purpose	Successes and Challenges
New Hampshire Community Action Association and WIC-Head Start-Office of Workforce Opportunity-DSS	Broad partnership network of 130 community-based organizations designed for “seamless family support.”	Helpful flexibility in staffing and information-sharing, though a simultaneous scarcity of resources and occasional duplication of staff positions/supervision.
New Jersey Department of Social Services office and “statewide faith-based initiative”	TANF office partnerships include CWEP program, DV shelter, a housing program and others.	Shared mission leads to additional benefits from wide-ranging FBCOs, though for their part they can sometimes be frustrated by regulations or restrictions of some public programs.
Oklahoma Department of Human Services and Whiz Kids	Facilitate tutoring for TANF families with 1 st thru 6 th graders, and support one another.	Whiz Kids supports children and families through a myriad of volunteers, and helps connect needy families to Oklahoma DHS programs.
Oregon Department of Human Services and Goodwill Industries	Designed to strengthen participant “connections” via Goodwill programs, after 51 percent DHS budget reduction.	Strong enthusiasm for tying into existing Goodwill resources and programs, but unclear whether this young partnership can sustain large number of TANF participants during budget shortfall.
Rhode Island Department of Human Services and Dorcas Place (and preliminarily, Open Table of Christ)	Provides access for DSS program participants to educational, medical and workforce benefits of two large community partners.	Excellent working history between organizations, though sometimes TANF requirements have hindered participant continuity in the “next steps” assigned by Dorcas Place case managers.
San Diego County Department of Health and Human Services and Metro United Urban Ministry	Helps maximize CalWORKS impact, close service delivery gaps, and promote <i>Live Well San Diego!</i> Strategy.	Rev. Hughes (of Metro United) serves on key committees and pulls together strategic community leaders with programs that dovetail with HHS goals. Challenges include some limits in “commitments” by urban ministry members.
South Carolina Department of Social Services and South Carolina Center for Fathers & Families	Longstanding partnership that enables concrete, user-friendly support for husbands and fathers in TANF-eligible families.	Custodial mothers gain greater emotional & financial support from fathers. Early challenge was some initial mistrust by DSS of family implications, as well as occasional misunderstandings re. faith-based language.
Southwest Wyoming Recovery Access Programs (SW-WRAP) and Wyoming Department of Family Services’ Voucher-based Initiative	Through established MOUs, a broad range of community- and faith-based organizations can receive vouchers through a new WY State DFS TANF Initiative.	Broad employment, transportation and other supports, but challenging to track wide range of consumer needs, and for FBCO partners to maintain continuity with program.
Vermont “Reach Up” (TANF) and “Vocational Rehabilitation” Partnership	Partnership links together TANF program and Housing, Transportation, and Childcare case management support team.	Strong communication by partners and sharing of assessment/case management tools, but some tensions in supervision, “common language” and benchmarking.

Partnership Organizations	Purpose	Successes and Challenges
Washington Department of Social & Health Services & Pierce County Community Connections-Associated Ministries	Designed to leverage resources through sustainable programming that serves needy families.	Hefty budget deficit has undermined funding stream for current community partners, but ongoing communication has maintained informal collaboration on behalf of low-income participants.
Washington Department of Human Services and Catholic Charities/Community Family Life Centers	To promote consumer nutrition, access to benefits, and “family mentoring.”	Does foster a strong community network that promotes healthier life skills, but some literacy and language barriers, as well as difficulty retaining mentors.
Workforce Solutions for Tarrant County and Family Pathfinders	A Texas collaboration between a workforce agency and faith-based organization, to mentor TANF participants through the organization’s 610 trained volunteers.	Partnership has generated an 85 percent employment retention rate, and is reinforced through an annual contract.

Next Steps

Under OFA leadership, and in light of the favorable receptivity to the initial round of 30-day follow-up calls, the project team is excited about the opportunity to follow-up by phone a second time with this year’s Collaboration Institute participants. Numerous participants spoke candidly about their appreciation for the “soft check-in” and accountability that comes from knowing they would be “reporting on progress to date.” The OFA TA Team also plans to follow-up with Collaboration Institute participants once again 180 days following their participation in this year’s institutes.

Additionally, building on the success of two project Webinars in 2011, an interactive Webinar is planned for January 2012 to share key findings from this report with State and Regional TANF leadership, and showcase 3-4 highly promising examples of TANF-FBCO collaboration. The purpose of the Webinar will be to engage leadership in discussions about broader application of the lessons learned in this final phase of the project.

Insights and Recommendations

This initiative has uncovered some important, up-to-date insights about existing collaboration and promising practices between TANF offices and diverse community-based programs, including faith-based programs and a range of other neighborhood programs. The chart in the previous section illustrates the diversity of not only FBCOs but also *public* agencies—which range from traditional local or state-based Departments of Social Services to One-Stop Career Centers, public educational institutions, Departments of Correction, Head Start programs, Child Support agencies and other organizations. In other words, exploring fruitful examples of TANF-FBCO collaboration illustrates how—in some communities,—the concept of collaboration is broadly and deeply rooted, extending beyond TANF program agencies into other public

partners. We believe there is much to learn from these partnerships and their correlative examples of both promising practices and challenges.

On a logistical level, it was clear from the evaluations that Collaboration Institute participants generally preferred meeting prior to the multi-day Regional technical assistance Roundtables/Workshops, and whenever possible, keeping the Collaboration Institute to a full day (rather than splitting up the curriculum across two days). They also expressed broad appreciation for the soft accountability created by a follow-up phone call, a practice for consideration following similar OFA-sponsored trainings.

Moreover, the evaluations from the Collaboration Institutes indicated the value of “bringing together into one room” partners who, amidst busy lives and ranging responsibilities, rarely sit and work together. Participants from nearly all five Collaboration Institutes scored highly their opportunities to engage collectively in action plans for their local community, indicating the value of providing “open space” to deepen partnerships, supported by a curriculum with tools and resources designed to support new forms of collaboration. There may be opportunities to apply these workshop practices—including direct excerpts from the curriculum—in other OFA-sponsored training settings. This partner-group concept may be applicable to other public-private partnership efforts such as Healthy Marriage and Responsible Fatherhood grantees who are encouraged to collaborate with safety-net stakeholders such as child welfare or Office of Child Support. Other federal initiatives such as Head Start or HHS asset-building initiatives may be another good opportunity to encourage collaboration.

One surprising finding, despite the positive impact of many FBCOs working in partnership with TANF offices, was that this project uncovered numerous examples in which many of these neighborhood programs were unaware of the specific operations of the safety net programs operating within their community. In a number of cases, there was little or no contact between FBCO services for low-income Americans and the TANF or Food Stamp Employment and Training Program (FSET) offices in their neighborhoods. Many TANF agencies were also not aware of other federally funded initiatives such as the Healthy Marriage and Fatherhood grantees. AmeriCorps, Bank-On and other federally supported efforts could be linked to TANF agencies through technical assistance or other integration efforts to link initiatives.

The assessment tool findings also offer some important insights. The idea that even where TANF directors are open to ideas, only 13.1 percent feel the organization develops sufficient staffing capacity to support new collaborative ventures is significant as a potential barrier. Perhaps more technical assistance would be helpful to provide the tools TANF directors need to build staff capacity.

Another revealing finding was that less than 22 percent of TANF agencies have pursued funding through a partnership. Given the budgetary constraints, this would be an excellent strategy for developing collaborations to build organizational capacity. It also addresses some of the response identified during the research phase of the project; some TANF agencies felt FBCOs

only came to them for funding - together the partnership can pursue funding. Providing technical assistance related to identifying and pursuing appropriate funding opportunities could be helpful.

The assessment tools in general could serve as useful tools for TANF agencies. TANF Directors could use the Collaboration Readiness Assessment with their staff as a starting point to address internal barriers to collaboration. High scores in the "*Board Governance*" section trended to high scores across organizational infrastructure creating an opportunity to use the tool as a screening mechanism for potential FBCO partnerships. Either using the complete tool or simply asking the 11 questions on board governance as part of an initial meeting could provide valuable insight on the maturity level of a potential FBCO partner.

An end goal of the Collaboration Institute series was to determine if we could create a replicable model for identifying, developing and sustaining collaborative public-private partnerships as a capacity building strategy to meet the diverse needs of individual families while strengthening community safety-nets. This project has developed a strong blueprint.

Appendix A: Project Phases

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Appendix A – Project Phases and Deliverables

Phase 1: Data-Collection (2007-08)

- After developing an early “Environmental Scan” of nationwide organizations, we produced a 151-page publication entitled [*FBCO Partnerships with TANF Agencies: A Compendium*](#) (Fairfax: ICF International, 2008), which documents core components of 139 local social service organizations in relationship with local TANF offices or other public agencies. This document forms the core “universe” of our initial look at relationships between TANF programs and FBCOs, and after a careful vetting process, 23 of these organizations with highly promising elements were selected for further study.
- Additionally, the project team wrote an early “foundation paper” published by the White House Office of Faith-Based and Community Partnerships in 2007, entitled ***Partnerships that Work: Early Findings from the TANF Faith-Based and Community Organizations Initiative***. This 18-page paper considers five partnership initiatives between FBCOs and TANF agencies or One-Stop Career Centers, drawing lessons for broader forms of collaboration.

Phase 2: Refined Analysis (2008-09)

- During this stage of the project, the project produced a resource entitled ***Snapshots of Promising Practices*** (Fairfax: ICF International, 2009), an 84-page report which presents a refined analysis of the top 23 FBCOs. To develop this piece, the research team followed up via structured discussions with Executive Directors in each site, and subsequently identified eight sites that would participate in on-site interviews and analysis.
- Additionally, the project team published an additional paper, entitled ***A Shared Perspective: Enhancing TANF-FBCO Partnerships***. This 5-page piece offers some contextual background about the Charitable Choice provision of the 1996 welfare reform law before making seven concrete recommendations about effective partnerships.

Phase 3: Site Visits (2009-10)

- During this phase the team conducted 2-day site visits with each of the eight leading FBCO partners, and developed case studies about FBCO programs working collaboratively with their local TANF office. The team published ***eight case studies*** (each ranging from 7-12 pages), as well as a 4-page ***Introduction***. The project case studies were titled by organization and location, as follows:
 - ***Bethel Development Corporation*** (Millville, NJ)
 - ***Faith Connections*** (Wilson, NC)

- **Pathways – VA** (Petersburg, VA)
 - **Sacramento Healthy Marriage Project** (Sacramento, CA)
 - **Henry Street Settlement** (New York, NY)
 - **Missouri Valley Community Action Agency** (Marshall, MO)
 - **Faith Partners** (El Paso, CO)
 - **Future Foundation** (Atlanta, GA)
- In addition to the case studies, the team gathered and published on a project Web page linked to the Welfare Peer TA site a list of “toolkit materials,” consisting of the following items:
 - **Faith Partners Operations Manual**
 - **Petersburg Department of Social Services Memorandum of Understanding (MOU)**
 - **Sacramento Healthy Marriage Project PowerPoint**
 - **Pathways Program Application and Drive-to-Work MOU**
 - **Reef House Parent Questionnaire, Logic Model, and Student Survey**
 - **Wilson County Assistance Contract, Donor Recipient Agreement, PowerPoint, Partners in Ministry Agreement, Referral for Mentoring, Release of Confidentiality Form, and Sample Referral Tracking Sheet**
 - A sample version of a November 2010 **Domestic Violence Screening Tool**
 - Links to the **National Healthy Marriage Resource Center** and list of resources from the **National Responsible Fatherhood Clearinghouse**

(Please note: all of the publications noted above can be viewed online on the project’s Web page, noted via the Welfare Peer TA link cited below.)

<http://peerta.acf.hhs.gov/index.cfm?event=viewTopic§ionTopicId=65&topicId=21&tabtopic=21§ionId=16&nav=21>

Phase 4: Research to Practice (2010-11)

This final phase of the project included targeted outreach to disseminate insights of earlier learning as described in each of the deliverables below:

- *Enhancing TANF Faith-Based and Community Partnerships: Essential Readiness Factors and Capacities of TANF Agencies and FBCOs* is an analytical report that synthesizes the first three phases of the project, presenting key findings for TANF officials and FBCO leaders in a readable, practical tone. With these two primary audiences in mind: it identifies key strategies and core readiness factors commonly found in successful TANF-FBCO partnerships, offering direct advice for community-based leaders and TANF officials contemplating partnership.
- A Webinar, *TANF and FBCOs Working Together: An Incubated Coalition and an Inter-Agency Intermediary* was convened on April 26, 2011. A group of 98 participants participated in this 90-minute event, during which OFA’s Branch Chief and the project’s

Federal Project Officer introduced the impending Collaboration Institutes. The webinar also included a pair of presentations from Faith Connections, a faith-based coalition network in Wilson County, North Carolina and Seedco, a workforce intermediary in New York City. A survey was conducted at the end of the Webinar which validated that the topics proposed for the Institutes would appeal to the intended audience.

- Welfare, Research and Evaluation Conference in Washington, DC, June 2, 2011. In partnership with OFA, the team hosted a poster session, entitled *TANF Faith-Based and Community Organizations Initiative*, which offered a visual display of the types of national partnerships examined, project research methodology, key elements used in selecting programs for inclusion, and areas of key interest among Webinar participants. **(Appendix B).**
- *Collaboration Institute Regional Meetings.* The purpose of these five regionally based Institutes was to facilitate a hands-on learning experience for a select group of 20-35 TANF leaders and their partnering FBCO practitioners. The goal was to use cutting-edge, field-based research to develop existing collaborations or promote new partnerships between TANF agencies and their community partners, so they could more effectively support TANF participants. Each Institute invited partner groups from each State, including the State TANF director, a local TANF agency leader, and 1-2 FBCO leaders that had a demonstrated interest in supporting TANF participants. Participation was highly successful, with participation from 40 states or territories, including all ten HHS Regions of the country. **(Appendix C)**
- An interactive *Workbook Curriculum (Appendix D)* developed in partnership with OFA guided each of these facilitated sessions. The comprehensive structured curriculum is 65 pages, in addition to a series of Appendices. It includes descriptions of the project's overall learning, the analytical paper, along with sections on; the importance of volunteers, organizational infrastructure – with specific resources both TANF and FBCO leaders, inter-agency communication, and action planning. Additional region specific resources were included in the notebook as well.
- Following each *Collaboration Institute*, the project team conducted 30-day follow-up phone-based discussions with participants from each Collaboration Institute meeting. Every TANF director or FBCO representative was invited to join a state-specific call, which provided a forum for participants to update one another and the project team on the implementation status of their Action Plans. (These plans were typically developed between the local TANF official and their FBCO partner(s) during the final 90 minutes of each Collaboration Institute, though in some cases, individuals worked separately.) The action plan represents each group's "takeaway" commitments for new partnership activity, allowing them to integrate several specific, concrete strategies from the meeting that could be measured within a period of months.

- Finally, on November 29, 2011 the project team hosted a Webinar, entitled *A New Look at Volunteering: Promising Approaches for TANF and Community Leaders*. The webinar featured a presentation by the Corporation for National and Community Service (CNCS), as well as TANF director and community-based program leader who have each integrated several exemplary ideas commended during the Collaboration Institute. Their partnerships with volunteers associated with the HandsOn Network, CNCS, United Way, AmeriCorps and TANF participants offered firsthand examples of the kinds of structural partnerships and management practices other practitioners can learn from directly.

Appendix B: WREC Poster

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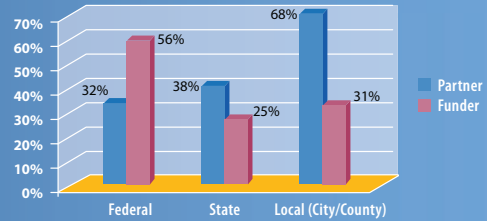
TANF Faith-Based and Community Organizations Initiative

The TANF Faith-Based and Community Organizations Initiative is a 4-year project that examines promising partnerships between TANF offices and FBCOs working in their communities. Its purpose is to help low-income families attain economic self-sufficiency by connecting some of the unique strengths of faith-based organizations, community-based groups, and intermediary organizations with TANF programs at the State and local levels.

Phase 1 – Development (2007–08)

The project team collected information from grassroots FBCOs nationwide, resulting in a *Compendium of Organizations*, a 151-page catalogue documenting core components of 139 local social service organizations. After a careful vetting process (pictured below), 23 of these organizations with highly promising elements were selected for further study.

Types of Government Partnerships Among 139 FBCOs



Research Methodology



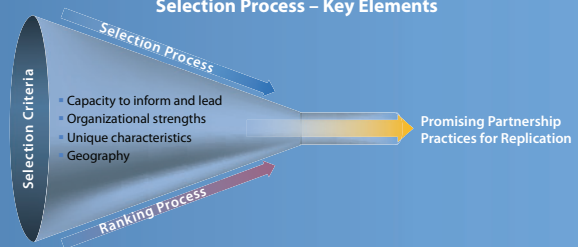
Phase 2 – Refined Analysis (2008–09)

The project refined the analysis of the top 23 FBCOs, publishing an 84-page *Snapshots of Success* report that emerged from phone-based research with executive directors in each site. Subsequently, using a set of research protocols, the team identified 8 sites to participate in follow-up on-site interviews and analysis.

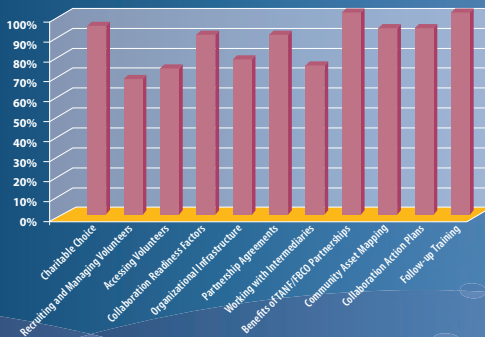
Phase 3 – Site Visits (2009–10)

The team conducted 2-day site visits with each of the 8 leading FBCO partners, developing case studies about each FBCO partnership with its local TANF office and other public partners. These case studies helped to synthesize key patterns and determine common readiness factors that seem to be necessary for successful collaboration.

Selection Process – Key Elements



April 2011 Webinar Poll Results – Participant Interest



Phase 4 – Field Dissemination (Present)

The project team posted publications and other relevant tools on the Welfare Peer TA website so they can be used by TANF officials, FBCO leaders, and other practitioners nationwide. Using a project analytical report that reviews leading practices from all eight program partnerships, the team will host a series of one-day Collaboration Institute meetings in 2011 with regional and State TANF leaders, as well as their local FBCO partners, with a goal of enhancing outcomes for TANF-eligible individuals and families. Topics for these gatherings resonated strongly with TANF directors and FBCO leaders who participated in a national webinar on April 26, 2011.

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Appendix C: Regional Participation

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TANF Faith-Based and Community Partnerships Collaboration Institute Evaluation: Cumulative

TANF Faith-Based and Community Partnership Collaboration Institute Evaluation	Percentage Respondents Agree or Strongly Agree
Section 1: TANF-FBCO Collaboration Overview	
I have a better understanding of Charitable Choice and its implications for TANF/Faith Partnerships.	84.4%
I have a better understanding of Readiness Factors and organizational capacity as defined in the Analytical Report.	84.8%
Section 2: Volunteer Management	
I have a better understanding of different types of volunteers and using volunteers to build organizational capacity.	90.4%
I have a better understanding of volunteer management.	83.6%
I found the Volunteer Position Development Activity helpful.	80.5%
I found the funding information helpful.	73.3%
Section 3: Organizational Infrastructure	
I have an increased awareness of the importance of appropriate organizational infrastructure including having defined roles and responsibilities, written job descriptions and written policies related to administrative oversight.	86.1%
I better understand the importance of administrative capacity to track data and use data to inform program decisions and measure outcomes.	83.1%
I better understand the importance of creating a collaborative culture that actively seeks and nurtures partnerships including dedicated staff, strategic internal policies and consideration of co-locating services.	86.8%
I found the Staffing Plan Activity helpful.	77.3%
I found the Organizational Self-Assessment (FBCOs) helpful.	70.7%
I found the Collaboration Assessment (TANF Office) helpful.	76.5%
Section 4: Table Topic Lunch Discussion	
The table topic discussion was helpful as preparation for the Action Planning afternoon session.	77.6%
Section 5: Interagency Communication	
I learned new strategies for initiating and maintaining win-win collaborative partnerships.	80.5%
I better understand the distinctions and appropriate uses of Partnership Agreements, Memorandum of Understanding (MOU) and Performance Based Contracts.	76.4%
I learned new strategies for overcoming communication barriers and developing inter-agency communication protocols.	72.7%
The Partnership Agreement (Community Partner Activity) was helpful.	73.4%

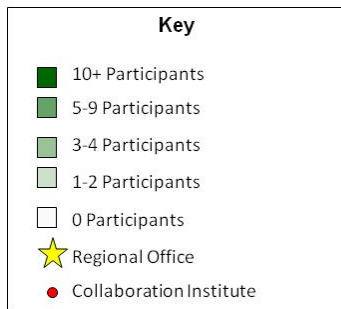
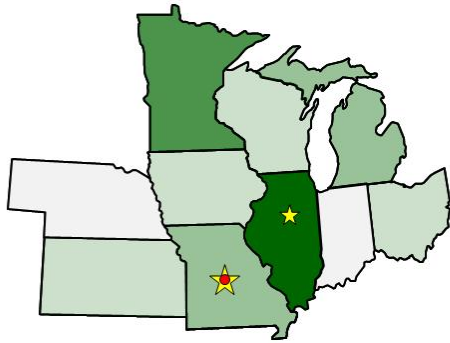
TANF Faith-Based and Community Partnership Collaboration Institute Evaluation	Percentage Respondents Agree or Strongly Agree
Section 6: Action Planning	
I better understand concepts related to community asset mapping and action planning as capacity building strategies.	88.4%
I better understand concepts related to community asset mapping and action planning as capacity building strategies.	82.4%
The Community Asset Map (Community Partner Activity) was helpful.	86.0%
The Action Plan: Ideas for Action (Community Partner Activity) was helpful.	89.0%
Overall	
The Collaboration Institute provided information that will be beneficial to my work.	91.8%
I would recommend this event to other TANF/FBCO groups wanting to collaborate.	91.0%

Regions V and VII

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Kansas City Collaboration Institute Attendance

Regions V and VII Participants



Regional TANF Offices

- U.S. Department of Health and Human Services Administration for Children and Families, Office of Family Assistance, Region V and Region VII

State TANF Offices

- Illinois Department of Human Services
- Iowa Department of Human Services
- Kansas Social and Rehabilitation Services
- Michigan Department of Human Services
- Minnesota Department of Human Services
- Ohio Governor's Office of Faith-Based and Community Initiatives
- Wisconsin Department of Children and Families
- Workforce Development Agency, State of Michigan

Local TANF Offices

- Calumet Township
- Illinois Department of Human Services, Lower North Family and Community Resource Center
- Ramsey County
- Wilkin County Family Service Agency

Faith or Community Based Organizations

- American Indian Family Center
- Community and Economic Development Association
- HIRED
- Human Capital Development
- Ohio Association of Second Harvest Foodbanks
- Peace Hospice and Palliative Care
- Rural Minnesota CEP, Inc.
- Sinai Community Institute
- UMOS

* Participants include ACF Regional Staff, State and Local TANF Representatives and FBCO Representatives

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AGENDA

WEDNESDAY, JUNE 29, 2011

Overview

This Collaboration Workshop will share key readiness factors and capacities necessary to establish strong partnerships between TANF agencies and local FBCOs. Leaders from both sectors will strategically outline how they can work together to deliver improved services to enhance the entire economic self-sufficiency experience for low-income families and develop functional collaboration plans.

12:30 p.m. – 1:00 p.m.

Registration

1:00 p.m. – 1:15 p.m.

Welcoming Remarks and Overview

Patricia Brown, Regional Administrator
Administration for Children and Families, Region VII

Steven Krasner, TANF Program Manager
Administration for Children and Families, Region V

Gary Allen, TANF Program Manager
Administration for Children and Families- Region VII

Moderator: Al Fleming, Federal Project Officer
Office of Family Assistance

1:15 p.m. – 1:45 p.m.

TANF-FBCO Collaboration Overview

This session will highlight an overview of the Charitable Choice Provision and a review of the Enhancing TANF Faith-Based and Community Partnerships analytical report which is a precursor to this event.

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenters: Al Fleming, Federal Project Officer
Office of Family Assistance

Jeanette Hercik, Vice President
ICF International

1:45 p.m. – 2:45 p.m.

The Importance of Volunteers

This session will highlight different types of volunteers and provide tips for building organizational capacity utilizing volunteers. The participants will be provided information to strengthen their understanding of volunteer management and identify capacity building resources related to volunteers. Both the TANF and FBCO perspectives regarding volunteers management will be explored.

Moderator: Jeanette Hercik, Vice President
ICF International

Presenters: Glenn Osborne, Director
Wilson County, NC Department of Social Services

Becky Stottlemire, Faith Connections Program Coordinator
Wilson County, NC Department of Social Services

Robyn Cenizal, Senior Manager
ICF International

Gary Renville, Vice President
Hands-On Network

Michael Laverty, State Program Director
Corporation for National and Community Service

2:45 p.m. – 3:00 p.m.

Break

3:00 p.m. – 4:30 p.m.

Organizational Infrastructure Break-Out Session

Session A for FBCO leaders

Focused discussion topics will include: organizational assessment; staffing structure, defined roles and responsibilities, written job descriptions, administrative capacity to track data, delineation between religious and social programming, and working with intermediaries.

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenter: Becky Stottlemire Faith Connections Program Coordinator
Wilson County, NC Department of Social Services

Session B for TANF leaders

Focused discussion topics will include: collaboration readiness assessment; creating a collaborative culture, dedicated staff, internal policies, and coordinating the co-location of services.

Moderator: Damon Waters, Technical Specialist
ICF International

Presenter: Glenn Osborne, Director
Wilson County, NC Department of Social Services

4:30 p.m. – 5:00 p.m.

Wrap-up

Moderators: Al Fleming, Federal Project Officer
Office of Family Assistance

Robyn Cenizal, Senior Manager
ICF International

THURSDAY, JUNE 30, 2011

8:30 a.m. – 9:30 a.m.

Interactive Discussion

Participants will be engaged in participatory table-top discussions around particular collaboration topics.

Facilitator: Damon Waters, Technical Specialist
ICF International

9:30 a.m. – 10:45 a.m.

Interagency Communication

This session will highlight communication mechanisms used to build stronger partnerships. Developing partnership agreements, memoranda of understandings, performance based contracts, written protocols, and ongoing communication strategies to strengthen the collaborative efforts.

Presenter: Robyn Cenizal, Senior Manager
ICF International

10:45 a.m. – 11:00 a.m.

Break

11:00 a.m. – 12:30 p.m.

Action Planning

Participants will use information gathered throughout the Collaboration Institute to map their community's needs and develop Action Plans.

Facilitator: Penny Tinsman, Senior Project Manager
ICF International

12:30 p.m. – 1:00 p.m.

Closing Remarks and Next Steps

Steven Krasner, TANF Program Manager
Administration for Children and Families, Region V

Gary Allen, TANF Program Manager
Administration for Children and Families- Region VII

Al Fleming, Federal Project Officer
Office of Family Assistance

TANF Faith-Based and Community Partnership Collaboration Institute Evaluation- Kansas City

Regions V and VII - Kansas City, MO June 29 & 30, 2011	Percentage Respondents Agree or Strongly Agree
Section 1: TANF-FBCO Collaboration Overview	
I have a better understanding of Charitable Choice and its implications for TANF/Faith Partnerships. (n=26)	80.0%
I have a better understanding of Readiness Factors and organizational capacity as defined in the Analytical Report. (n=26)	79.2%
Section 2: Volunteer Management	
I have a better understanding of different types of volunteers and using volunteers to build organizational capacity. (n=26)	84.6%
I have a better understanding of volunteer management. (n=26)	73.1%
I found the Volunteer Position Development Activity helpful. (n=26)	65.4%
I found the funding information helpful. (n=24)	75.0%
Section 3: Organizational Infrastructure	
I have an increased awareness of the importance of appropriate organizational infrastructure including having defined roles and responsibilities, written job descriptions and written policies related to administrative oversight. (n=26)	69.2%
I better understand the importance of administrative capacity to track data and use data to inform program decisions and measure outcomes. (n=25)	64.0%
I better understand the importance of creating a collaborative culture that actively seeks and nurtures partnerships including dedicated staff, strategic internal policies and consideration of co-locating services. (n=26)	76.9%
I found the Staffing Plan Activity helpful. (n=26)	61.5%
I found the Organizational Self-Assessment (FBCOs) helpful. (n=26)	57.7%
I found the Collaboration Assessment (TANF Office) helpful. (n=26)	57.7%
Section 4: Table Topic Lunch Discussion	
The table topic discussion was helpful as preparation for the Action Planning afternoon session. (n=25)	72.0%
Section 5: Interagency Communication	
I learned new strategies for initiating and maintaining win-win collaborative partnerships. (n=26)	76.9%
I better understand the distinctions and appropriate uses of Partnership Agreements, Memorandum of Understanding (MOU) and Performance Based Contracts. (n=26)	61.5%
I learned new strategies for overcoming communication barriers and developing inter-agency communication protocols. (n=26)	65.4%
The Partnership Agreement (Community Partner Activity) was helpful. (n=25)	68.0%

Regions V and VII - Kansas City, MO June 29 & 30, 2011	Percentage Respondents Agree or Strongly Agree
Section 6: Action Planning	
I better understand concepts related to community asset mapping and action planning as capacity building strategies. (n=24)	91.7%
I better understand concepts related to community asset mapping and action planning as capacity building strategies. (n=25)	84.0%
The Community Asset Map (Community Partner Activity) was helpful. (n=25)	88.0%
The Action Plan: Ideas for Action (Community Partner Activity) was helpful. (n=24)	87.5%
Overall	
The Collaboration Institute provided information that will be beneficial to my work. (n=26)	88.5%
I would recommend this event to other TANF/FBCO groups wanting to collaborate. (n=26)	76.9%

Comments

Which presentation/activity was most helpful and why:

Overall

- The discussion was great in each activity.
- What I found most helpful was not a specific presentation but the jargon used throughout is useful for grants.
 - *I intend to write grant for my current organization as I have in the past.*
- All the presentations were excellent; I learned something from them all.
 - *They presented a different perspective on collaborating and leveraging resources in communities during the economic downturn*
- All the activities/presentation/interactions on the second were most helpful
- Great meeting
 - *Excellent information sharing- networking- community based focus*
- All the activities/presentation/interactions on the second were most helpful
 - *It was tangible an actual real examples of things to take back. This also fostered an environment to talk to our partners and duplicate these partnerships in our TANF offices.*
- The presentation regarding benefits of TANF/FBCO partnerships
 - *Because it confirmed that we are on the right track*
- Overall- very good engage people quickly.

Importance of Volunteers

- Gary Renville- importance of volunteers, Becky Stottlemeyer- importance of volunteers
- The speakers on the first day (Gary and Michael)
 - *Informative resources*

- All the info on how other counties/states partner up to meet their needs. Becky was insightful. I liked what she offered- tips/techniques to recruit agencies/organizations to buy into volunteer services/donations or expand relations.

AmeriCorps

- AmeriCorps
 - *I didn't know this existed- I'm excited to utilize w/ young students!!*
- Vista/AmeriCorps- needed to be on longer, wanted more info. The entire meeting was informative. Opened my mind on.
 - *Want to get details on how their program can help TANF participants and how to get connected to it. But I now have the Web site. I will follow-up.*
- Day 2- Sharing by all attendee- what collaborations are in place and what do they do; importance of volunteers (info on AmeriCorps)
 - *Gave me ideas and info to ask for more information.*
- I enjoyed the group activities, it helped to make these ideas and concepts concrete
- AmeriCorps and CNCS
 - *I love the programs they have and the accessibility*
- AmeriCorps
 - *Knowledge of volunteer fundraising*
- Vista was very informative, need longer session.

Action Planning

- Ball of yarn/beach ball
- Action Planning
 - *This was engaging and helpful.*
- The interactive yarn game was great on finding the gap on services and tightens up our relationship. Great way to see what we need.
- Beach-ball activity- great interaction, sharing about our collaborative partners and allowing everyone to share about their own projects. Also charitable choice- Wilson County was great to hear about.
 - *Great interaction and energy was generated. Sharing helped everyone understand about other collaborative interactions.*
- The action planning session was quite helpful because of identifying future possible partnerships.

Networking or Table Top Discussions

- Hearing from other agencies and their partnerships- more time for this at future meetings would be nice.
 - *Nice to hear good work others are doing: learning from them of things we might be able to implement.*
- Great listening to what other organizations are doing and thinking of doing in sustaining collaborative relationships. - 1. Grant writing, 2, supportive resources (i.e. carfare, ramp etc), 3. private donations

Breakout Sessions

- I enjoyed the break out session for TANF partners.
 - *It made the concept tangible*

Which presentation/activity was least helpful and why:

Overall

- Too many presentations.
- *Would be good to add research and theory to support the push for collaboration.*
- The 1st 1 1/2 hours of this training was a brag session about what is being done by the individuals (up through Becky), rather than tangible instruction in how to do such things. In addition much this is antiquated: I learned it in the early 90s.
- Too much introduction on how lucky and fortunate we are to be here (could be said by one person)
 - *Cut into presenters and their speeches were too rushed.*
- The basics of partnering-service brokering
 - *I believe we all know this already.*
- Time spent discussing presenters backgrounds was wasted
 - *Could discuss the benefit of good (?) how to collaborate with partners or write grants conducive for families/communities.*
- The room was too cold.
- Interactive discussions, having one after each presentation is too much
- Organizational infrastructure, collaboration review, volunteer management, MOUs
 - *Overall, there seemed to be an assumption that localities/states don't know the resources in the area and don't already collaborate. Most information was too fundamental. It would have been more helpful to hear more from more people who have strong collaborations in place. It also would be helpful to hear about different styles of collaboration and communication depending on community involved. Mainstream collaboration and communication style doesn't seem to work well depending on the community involved. This seminar felt like an introduction session what we could use is something more advanced: Major learning's, obstacle and how to overcome, evaluations that have been done.*
- The first day- some of the discussion centered more on faith-based organizations.

Volunteer Management

- Volunteer management.
 - *I don't do the volunteer management work at this time.*
- Volunteer position description development
 - *Too elementary.*
- Volunteer position description was not that helpful. Less bookwork and more sharing and interaction activities.
 - *People need to be engaged and not everyone is interested in analytical information. Need more concrete examples like AmeriCorps, VISTA, Hands's On, Wilson County, and etc.*

- The work site inventory, develop a job descriptions and partnership agreement activity.
 - *Did not know why I was filling out the form and what purpose it has. Also job description, I understand the outcome of having people articulation different perspectives, but I think it could just be share we all have different perspectives*

Collaboration Assessment

- Not real sure why we completed the collaboration assessment.

Breakout Session

- The break out session was the least helpful to me.
 - *I found it to be a little repetitive with Glenn and Becky. I need more substance.*

Other

- All were helpful to a degree.
 - *Learned something knew*
- I find that there was nothing least helpful, but it would have been nice to mix us all p to create networking opportunity.
- Overall I did not perceive any weak parts in the presentations. Next time mix up the tables, it would be great to have networked with others, just suggesting.
- All of the presentations were excellent and useful; I received an overflowing of information.

Additional Comments

- Closing remarks session: love the idea of specific Webinars on grant writing.
- For future events I would recommend emerging partnerships rather than strongly developed ones.
- This was wonderful! Helped strengthen current partnerships and gave fantastic resources and ideas. -- Thank you. Ideas: Maybe do an ice-breaker activity (like yarn game) in the beginning to meet other tables? Just a thought.
- Where can I find resources/agencies/private partners IDHS (?) Can look into and become win/win relationships. Great speakers and the presentations were easy to follow and informative. Thank you for inviting me.
- I think we missed out on a wealth of information from the State TANF offices and FBCOs on what types of collaborations they are currently working on and what has been successful. I believe most of us came here wanted to learn from others. The basics of partnering with local food banks, churches, clothing closets, literacy programs, etc. are not new; it is the deeper collaborations such as integrating intake for several different programs that would have made this valuable.
- Tweak things a bit and I would farther right (in terms of overall chart)... Could be a good tool for places that do not have an established partnership, but we already have a great relationship in place. It felt there is a presumption that agencies are not collaborating,

so some of this may not be useful. I think for future meetings see who already has a partnership in place versus those needing to start one. For those with partnerships look at activities or how you can help strengthen them. Also in community, we "just do it"; it is relational based on trust. Don't think the form would work well in the community.

30-Day Follow-up Report Kansas City Collaboration Institute

This report summarizes feedback from participants in Illinois, Ohio and Minnesota—including both Temporary Assistance for Needy Families (TANF) officials and their faith-based or community-based (FBCO) partners—who attended the initial TANF-FBCO Collaboration Institute in Kansas City. ICF conducted **four sets of 60-minute calls** to ascertain the current status of the “action plans” developed attendees of the Kansas City Institute. Whenever possible, steps were taken to convene both TANF leaders and their faith-based or community-based partner on the same call, though in some cases, this was not possible due to participant scheduling difficulties. A full list of those who participated in these calls is included as Figure 1. For each of these calls, ICF gathered baseline feedback for each of the following questions:

- *Have you shared your action plan with other members of your staff?*
- *Have you discussed your action plan with other organizations?*
- *Have you met in person or convened a call with your FBCO partner? (Or for the FBCO, have you followed up with your partnering TANF agency?)*
- *What were the three leading elements of your action plan?*
- *What changes, if any, have you made vis-à-vis volunteer management? What changes do you plan to make?*
- *What changes, if any, have you made regarding inter-agency partnership or communication? What are you planning in this area?*
- *What broader changes, if any, have you made as a result of the Collaboration Institute? Are you doing anything in terms of organizational development or cross-sector outreach?*
- *Now that you’ve been back in your local community for a month, what additional recommendations or reflections do you have regarding the Collaboration Institute?*
- *What additional technical assistance or other supports would be helpful to you, as you and your colleagues implement these changes and new partnerships in your community?*

Action Plan Results

Most **participants interviewed reported that they have shared key findings** from the Collaboration Institute with their staff teams, including both supervisors and staff. In most cases this meant reporting a new insight or possible outreach strategy vis-à-vis the use of **volunteers**, the value of **general FBCO outreach** by the TANF office, or cultivating **inter-agency strategic “win-win” partnerships** to stretch organizations beyond their current operating procedures. Specific timetables were not always fully adhered to, sometimes due to personnel changes or summer vacation schedules, but all five TANF-FBCO partnerships had made at least incremental progress in forging or deepening partnerships, as described in their work plans. The largest group who attended the Kansas City Collaboration Institute was from Illinois. Six participants from the state—including four TANF officials and two community-based partners—took part in calls reporting on their action plans. In several instances, these collaborations overlapped with one another, since jurisdictions were so close together. One TANF office returned from the Collaboration Institute to reach out to a local hospital and **several community-based organizations** within their township. **Mt. Sinai Hospital** joined a regular

monthly call to develop future collaboration, and a **new Head Start agency** was scheduled to join the group for a meeting the following month. These **monthly calls serve as the basis for local collaborations** that involve co-sponsored service opportunities, work placement sharing, and other events. Mt. Sinai Hospital currently serves the TANF work placement population, so they are a natural **“win-win” partner for the Illinois DHS Human Capital Development program**. Additionally, one TANF agency from the North Side of Chicago returned from the Institute to partner with **New Moms**, a faith-based organization that supports mothers and infants in practical ways, and to begin collaborating with **New Baptist Church’s food bank**. Clearly, a variety of new organizational partnerships emerged as a result of participants hearing about the value of win-win collaborations and strategic outreach to FBCOs in the community.

Elsewhere in Illinois, the Executive Director of the Calumet Township’s Community Center described how the Wilson County speaker’s example of a “comprehensive database of state contractors” and partners inspired her to begin building the same kind of **database**. As a result, she is working with the **Chamber of Commerce** and a city representative to build an **online Web site that hosts a comprehensive community asset map**. Additionally, Lavonne Banks of the Illinois Department of Human Services Family Resource Center described that as a result of the Collaboration Institute, **two volunteers began working in her office**. Each are students, and both volunteers underwent the kinds of **background checks** described during the Collaboration Institute, making it easy for the Family Resource Center’s staff to feel at ease in working with them. Another Illinois community-based partner described how she has reached out to **Senior Corps** to ask for their involvement in supporting senior citizens in collaboration with local congregations. She felt the **AmeriCorps/VISTA presentation** was practical, and her action plan calls for cultivating a strategic partnership that can be maintained for at least one year, based on at least 1-2 staff members from Senior Corps who are dedicated to maintaining the partnership.

Participants from Ohio have also shared key elements of their plans with their colleagues. In Ohio, the Governor’s Office of Faith-Based and Neighborhood Partnerships sent a representative who has met with her Director about the Institute, and their office team is currently expanding the current **list of faith-based and community organizations throughout the state** that can serve to support wide-ranging partnerships. Additionally, based on the volunteering component of the Kansas City Institute, her office has reached out to the **Corporation for National and Community Service** in Columbus, to explore a possible “place-based strategic partnership” specific to that city’s lowest-income community. Moreover, they are using several themes from the Institute, such as inter-agency collaboration, in developing the next tier of **Ohio’s Benefit Bank, which consists of a web-based, counselor-assisted application program for various human services benefits**. Since the Benefit Bank is designed to assist multi-agency benefits such as SNAP, Medicaid, TANF, and Social Security, the Ohio Governor’s office is working to expand agency collaboration where appropriate.

Finally, Minnesota’s two partnership groups shared that they were substantially affected by a state government shutdown immediately following the Collaboration Institute, on July 1-20, 2011. TANF leaders from two counties had attended the Collaboration Institute, along with

their workforce or community-based non-profit job-training partners—and all four participants agreed that informal partnerships and the **role of non-government organizations** are crucial in such times. Their action plans involved **initiating outreach to a new adult education agency in Ramsey County**, and deepening existing formal partnerships with some of the strategic insights from the meeting. Since the two TANF offices were eventually deemed “critical” and returned to work, their current and emerging partners include HIREd, Goodwill Easter Seals, Open Families Health Center, and River of Life Community Church, which provides meals to needy families and **give \$2,000 per month to TANF families** identified by the local agency. Ramsey County is attempting to develop an active list of at least **150 current or new partnerships with community-based organizations**, assuming those organizations share a commitment to supporting low-income families. Finally, they hope to enlist volunteers in supporting clients, through AmeriCorps or an **existing partnership with AmeriCorps VISTA**.

Post-Institute Changes

Follow-up calls with Kansas City Collaboration participants also inquired about specific changes that have taken place as a result of attending the Institute. One set of changes came with regard to volunteer management and use of volunteers. In Illinois, for example, one local office has built a new program **allowing TANF participants to volunteer in their organization** as a “stepping stone” to permanent employment. Another recruited a **high school and college student** to support filing and other relational work on Tuesdays and Thursdays. One Minnesota TANF office hired an **AmeriCorps VISTA volunteer to support non-custodial fathers** and encourage TANF participants in their work requirements. Ohio’s Governor’s OFBNP is reaching out to a group called Second Harvest, which has supported **one volunteer to help ex-prisoners** more successfully transition back to society.

Other changes have come in the form of deepening inter-agency communication. Two TANF agencies in Illinois have developed new inter-agency **Memorandums of Understanding** that they now require their new FBCO partners to sign before officially becoming partners. In articulating written goals of different organizations, “we try hard not to recreate a wheel that’s already in place,” Caprisca Randolph-Robinson described. Similarly, another partner described how more precise written communication clarifies **“what they give, and what we give, and specifically how we can both benefit.”** Ohio’s Benefit Bank is working to reach out to “citizen needs where they live, work, eat and pray,” as their literature describes, and it can only do so when wide-ranging grassroots partners communicate the availability of the Benefit Bank’s resources in these diverse settings. Finally, for TANF agencies and other public organizations asked to provide the same level of services with less money or state-wide reductions, “FBCO partnerships invariably help us with that: they help get the word out, and they help care for people,” Dave Saylor described. **“Sometimes budget cuts, as tough as they are, open doors to new partnering organizations.”**

Overall Reflections and Future Support

In general, feedback to this first Collaboration Institute was very positive. Participants felt the event was **well-organized, helpful, and “about the right length.”** In part due to the current economic climate, and alongside ongoing pressures for TANF agency officials to meet work

participation rates and other mandated requirements, most participants seemed very pleased to have attended. Many came away with new ideas: “I always knew there were a wide range of resources in the community,” one participant said, “but hearing from the North Carolina speakers made me think there are probably a lot of groups back home that we’re not connected with.”

One of the most consistent follow-up requests voiced by community-based organizations and local TANF agencies was “to host **a similar meeting with a larger group of our local partners.**” Gathering 10 organizations from Chicago, for instance, would allow a South Side TANF agency to develop its hospital partnership, involve a wider range of partners, and track TANF participant experiences. Bringing together “more of the groups we want to work with—including volunteer organizations and community-based partners” would allow us “to take these ideas to the next level,” Tamakisha Meeks suggested. “Wouldn’t it be great if the entire room could be from one local region within a State?”

Another idea was to **deepen the session on volunteering**, to include an overview about **recruiting** volunteers, something many public agencies and grassroots organizations are interested in doing. Helping local leaders navigate a mandatory 90-day **waiting period** for volunteers (which one community-based organization requires), or assisting them with practical suggestions about **advertising** for volunteers, would be useful, some participants suggested. One participant felt like this session gave a constructive introduction to the topic, but left him wanting more.

Finally, some participants asked if the core insights from the Collaboration Institute could more directly link to “**employment for our TANF participants**—since that’s our biggest pressure point, as agency leaders. Could we perhaps hear **from exemplary FBCOs about a way to actually get people jobs?** Could you share concrete examples from the research about how TANF participants actually found employment?” Another avenue might be to ask participants in the room to share leading illustrations about how their partnership(s) led to direct job placements.

As to future interests on the part of Collaboration Institute participants, one local partnership from Minnesota asked if the project team might consider **convening a follow-up Webinar**, or perhaps several Webinars, in partnership with the Welfare Peer TA Team on some of these timely topics. For example, could we host a conversation with an actual **AmeriCorps VISTA-TANF partnership on volunteering**, and describe how other organizations might create similar partnerships? Could we host a Webinar specifically about **work placements** that emerge from collaboration with FBCOs?

Finally, one partnership group asked if our team could help a local TANF office work with its FBCO partners to **build an in-depth, online community asset map** for Cook County, listing all FBCOs willing to work collaboratively with TANF participants and low-income families and individuals more generally. While several printed resource directories and the availability of web-based tools can help, no single database links together these potential partners—and

while the local staff is interested in developing a resource, they could use outside help to do so comprehensively.

Figure 1 – Kansas City 30-Day Follow-Up Call Participants

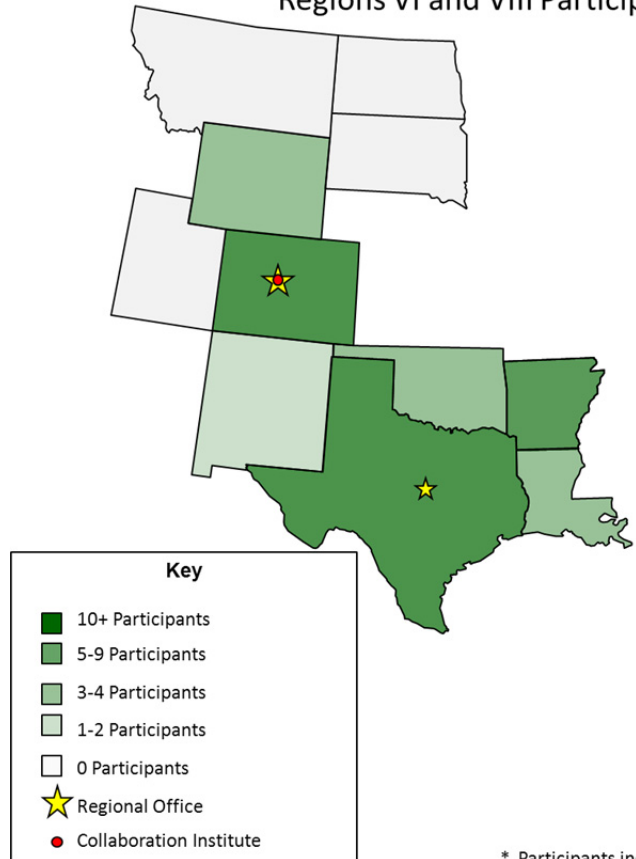
Participant	Title	Organization	Call Date
Gail D. Allen-Scott	Site Manager	Community and Economic Development Association	7/28/11
Lavonne Banks	Local Office Administrator	Illinois Department of Human Services	7/28/11
Kimberly Hettel	Deputy Director	Ohio Governor's Office of Faith-Based and Community Initiatives	8/2/11
Marie Hoffman	Case Manager	Rural Minnesota CEP, Inc.	8/1/11
Kari Kraft	Senior Program Manager	HIREd, Minnesota	8/1/11
Camille L. McLurkin	E& T Liaison/Manager	Human Capital Development, South Side TANF agency, Illinois	7/26/11
Tamakisha Meeks	TANF Human Services Caseworker Manager	Illinois Department of Human Services, Lower North Family and Community Resource Center	7/26/11
Caprisca Randolph-Robinson	Director, TANF	Illinois Department of Human Services	7/26/11
Dave Sayler	Human Services Director	Wilkin County Family Service Agency, Minnesota	8/1/11
Joan Truhler	TANF Manager	Ramsey County, Minnesota	8/1/11
Annie West	Executive Director	Calumet Township, Illinois	7/28/11

Regions VI and VIII

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Denver Regional Meeting Attendance

Regions VI and VIII Participants



Regional TANF Offices

- Administration for Children and Families, Office of Family Assistance, Region VI and Region VIII

State TANF Offices

- Arkansas Department of Workforce Services / TANF
- Colorado Department of Human Services
- Department of Children and Family Services, Louisiana
- New Mexico Human Services Department, Income Support Division
- Office of Faith Based & Community Based Initiatives, Oklahoma
- Oklahoma Department of Human Services
- Texas Workforce Commission
- Wyoming Department of Family Services

Local TANF Offices

- Workforce Solutions for Tarrant County

Faith or Community Based Organizations

- Arkansas Human Development Corporation
- Catholic Charities, New Mexico
- Catholic Charities, Diocese of Pueblo
- CityCare's Whiz Kids
- Crossings Community Church
- CWEE
- Department of Social Services
- Family Pathfinders
- Lutheran Family Services of Colorado
- Our House, Inc.
- SW-WRAP
- Waking Up, Inc.

* Participants include ACF Regional Staff, State and Local TANF Representatives and FBCO Representatives

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TANF Faith-Based Community Partnerships Collaboration Institute

AGENDA

THURSDAY, AUGUST 4, 2011

Overview

This Collaboration Workshop will share key readiness factors and capacities necessary to establish strong partnerships between TANF agencies and local FBCOs. Leaders from both sectors will strategically outline how they can work together to deliver improved services to enhance the entire economic self-sufficiency experience for low-income families and develop functional collaboration plans.

8:00 a.m. – 9:00 a.m.

Registration

9:00 a.m. – 9:20 a.m.

Welcoming Remarks /Introductions

Earl Johnson, Ph.D., Director
Office of Family Assistance

Felicia Gaither, TANF Program Manager
Administration for Children and Families, Region VIII

Larry Brendel, TANF Program Manager
Administration for Children and Families- Region VI

Moderator: Robyn Cenizal, Senior Manager
ICF International

9:20 a.m. – 9:40 a.m.

TANF-FBCO Collaboration Overview

Review materials and flow for the day, clarifying how activities/topics link in preparation for action planning and follow-up.

Overview of the Analytical Report highlighting Charitable Choice, Place-based Strategies and Collective Impact

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenters: Josh Good
ICF International



TANF Faith-Based Community Partnerships Collaboration Institute

9:40 a.m. – 10:50 a.m.

The Importance of Volunteers

This session will highlight different types of volunteers and provide tips for building organizational capacity utilizing volunteers. The participants will be provided information to strengthen their understanding of volunteer management and identify capacity building resources related to volunteers. Both the TANF and FBCO perspectives regarding volunteers management will be explored.

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenters: Gary Renville, Vice President
HandsOn Network

Tom Langehaug, State Program Director
Corporation for National and Community Service

10:50 a.m. – 11:00 a.m.

BREAK

11:00 a.m. –12:15 p.m.

Organizational Infrastructure Break-Out Session

Session A for FBCO leaders

Focused discussion topics will include: organizational assessment; staffing structure, defined roles and responsibilities, written job descriptions, administrative capacity to track data, delineation between religious and social programming, and working with intermediaries.

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenter: Josh Good
ICF International



TANF Faith-Based Community Partnerships Collaboration Institute

Session B for TANF leaders

Focused discussion topics will include: collaboration readiness assessment; creating a collaborative culture, dedicated staff, internal policies, and coordinating the co-location of services.

Moderator: Damon Waters, Technical Specialist
ICF International

Presenter: Francine Delgado, Senior Vice President
Seedco

12:15 p.m. – 1:45 p.m.

Interactive Lunch Session

Over a working lunch, targeted table topics will be discussed.

Partnership Highlights from the Room

Partner groups from each state will have the opportunity to share a five minute presentation about their partnerships including the nature of the partnerships and any successes and challenges they have faced.

1:45 p.m. – 3:00 p.m.

Inter-agency Communication

Discussion topics will include Initiating partnerships, memoranda of understanding, performance based contracts, ongoing communication strategies, and written protocols.

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenter: Myron Berzas, Program Manager 2
Louisiana Department of Children and Family Services

Gerald Dyer, Community Specialist
Louisiana Department of Children and Family Services

Francine Delgado, Senior Vice President
Seedco

3:00 p.m. –3:15 p.m.

BREAK



Administration for Children and Families, Office of Family Assistance, Regions VI and VIII

TANF Faith-Based Community Partnerships Collaboration Institute

3:15 p.m. – 4:30 p.m.

Action Planning

Participants will use information gathered throughout the Collaboration Institute to map their community's needs and develop Action Plans.

Facilitator: Penny Tinsman, Senior Project Manager
ICF International

4:30 p.m. – 4:45 p.m.

Closing Remarks and Next Steps

Closing Remarks

Next Steps – 30-day Follow-up, Webinars, etc.

Collaboration Institute Survey

Presenter: Felicia Gaither, TANF Program Manager
Administration for Children and Families, Region VIII

Robyn Cenizal, Senior Manager
ICF International

TANF Faith-Based and Community Partnership Collaboration Institute Evaluation: Denver, Colorado

Regions VI and VIII – Denver, CO August 4, 2011	Percentage Respondents Agree or Strongly Agree
Section 1: TANF-FBCO Collaboration Overview	
I have a better understanding of Charitable Choice and its implications for TANF/Faith Partnerships. (n=25)	84.0%
I have a better understanding of Readiness Factors and organizational capacity as defined in the Analytical Report. (n=25)	88.0%
Section 2: Volunteer Management	
I have a better understanding of different types of volunteers and using volunteers to build organizational capacity. (n=25)	84.0%
I have a better understanding of volunteer management. (n=24)	87.5%
I found the Volunteer Position Development Activity helpful. (n=25)	88.0%
I found the funding information helpful. (n=25)	76.0%
Section 3: Organizational Infrastructure	
I have an increased awareness of the importance of appropriate organizational infrastructure including having defined roles and responsibilities, written job descriptions and written policies related to administrative oversight. (n= 25)	84.0%
I better understand the importance of administrative capacity to track data and use data to inform program decisions and measure outcomes. (n=25)	84.0%
I better understand the importance of creating a collaborative culture that actively seeks and nurtures partnerships including dedicated staff, strategic internal policies and consideration of co-locating services.(n=25)	84.0%
I found the Staffing Plan Activity helpful. (n=24)	83.3%
I found the Organizational Self-Assessment (FBCOs) helpful. (n=22)	72.7%
I found the Collaboration Assessment (TANF Office) helpful. (n=24)	66.7%
Section 4: Table Topic Lunch Discussion	
The table topic discussion was helpful as preparation for the Action Planning afternoon session. (n=23)	73.9%
Section 5: Interagency Communication	
I learned new strategies for initiating and maintaining win-win collaborative partnerships. (n=25)	84.0%
I better understand the distinctions and appropriate uses of Partnership Agreements, Memorandum of Understanding (MOU) and Performance Based Contracts. (n=25)	84.0%
I learned new strategies for overcoming communication barriers and developing inter-agency communication protocols. (n=25)	80.0%
The Partnership Agreement (Community Partner Activity) was helpful. (n=22)	81.8%

Regions VI and VIII – Denver, CO August 4, 2011	Percentage Respondents Agree or Strongly Agree
Section 6: Action Planning	
I better understand concepts related to community asset mapping and action planning as capacity building strategies. (n=25)	80.0%
I better understand concepts related to community asset mapping and action planning as capacity building strategies. (n=23)	82.6%
The Community Asset Map (Community Partner Activity) was helpful. (n=25)	80.0%
The Action Plan: Ideas for Action (Community Partner Activity) was helpful. (n=23)	82.6%
Overall	
The Collaboration Institute provided information that will be beneficial to my work. (n=25)	92.0%
I would recommend this event to other TANF/FBCO groups wanting to collaborate. (n=24)	91.7%

Comments

Which presentation/activity was most helpful and why:

Overall

- Are you ready to collaborate assessment tool
 - *All success starts with self-awareness*
- Organization Infrastructure and staffing plan
- Made me re-think a staffing decision.
 - Learning about other programs and best practices and networking
 - *Always good to learn new programs, people and ideas!*
- Each individual partnership presentation
 - *It is beneficial to learn from visiting partnerships and what their real challenges and successes are.*
- Win-win-win activity
- All were helpful
- Partnerships
 - *Thinking outside the box was helpful*
- All
- All sessions were equally helpful to me because they all helped me to make what I am doing better.
 - *New ideas share from various states and agencies*
 - *They were very informative and "hit" the mark.*
- All were helpful... I gained something from all.
- Shared vision
 - *Establishing steps to start up*

Importance of Volunteers

- Volunteering
 - *It opens a new door as to how and where to find new volunteers. Also the various point of volunteers in the workplace.*
- Volunteer management
 - *Tapping into volunteer pool is essential to the sustainability and success of our program/organization*
- Volunteer position development activity. Resources on the action planning worksheets.
 - *Spur thoughts and gave a structural approach to plan. Will take back and use in my department for employees.*
- Volunteer information
 - *Helped to think about skill set staff needs to have to inc. FBCO collaboration*
- Utilizing volunteers and being specific with a job description for volunteers. The organization assessment is great
 - *With shortage of staff, volunteers will be helpful*
- Volunteer management
 - *Identification of the roles and responsibilities is often overlooked*

Networking or Table Top Discussions

- Networking with community partners and other TANF agencies
 - *Food for thought*
- Documents, templates- opportunities to talk with partners

Breakout Sessions

- During the breakout session to see what the other states expectations were in regards to their section.

Which presentation/activity was least helpful and why:

Overall

- Much of the organization and collaborative info is being implemented in my organization
 - *It was repetitive to what we already do. We are not a new organization- after decades of experience we have this in place already.*
- The intro/first speaker talked too long; the activities were at time difficult to me tune (?) action with our group.
- TANF/FBCO Collaboration
 - *Already have a strong understanding in these areas not reflexive of content-good info*
- Obviously the one we presented at because of our experience

Action Planning

- Action Plan
- *End of the day- not enough time to really do this activity- it will be useful to take home with us.*

Other

- Interagency communication
- Felt more like an agency/program overview
- Charitable choice
 - *Too short, not interactive and no time for Q and A*
- Partnership management
 - *With current structure of TANF program in state- w/ state management but locally delivered difficult to narrow down partner at state level.*

Additional Comments

- Needed more time to network- every time our table worked on an activity then begin to apply to actual practice the time was up!

30-Day Follow-up Report: Denver Collaboration Institute

This report summarizes feedback from participants in Texas, Louisiana, Oklahoma, Wyoming, Colorado, Arkansas and New Mexico—including both Temporary Assistance for Needy Families (TANF) officials and their community-based or faith-based (FBCO) partners—who attended the TANF-FBCOs Collaboration Institute meeting in Denver. ICF conducted **seven (7) sets of 60-minute calls** to ascertain the current status of the “action plans” developed by those at the Denver Collaboration Institute. Whenever possible, steps were taken to convene both TANF leaders and their FBCO partner on the same call, though in some cases, due to scheduling challenges the calls were held separately or alongside another state’s participants. A full list of those who participated in these calls is included as Figure 1 (see below).

For each of these calls, ICF gathered baseline feedback for each of the following questions:

- *Have you shared your action plan with other members of your staff?*
- *Have you discussed your action plan with other organizations?*
- *Have you met in person or convened a call with your FBCO partner? (Or for the FBCO, have you followed up with your partnering TANF agency?)*
- *What were the three leading elements of your action plan?*
- *What changes, if any, have you made vis-à-vis volunteer management? What changes do you plan to make?*
- *What changes, if any, have you made regarding inter-agency partnership or communication? What are you planning in this area?*
- *What broader changes, if any, have you made as a result of the Collaboration Institute? Are you doing anything in terms of organizational development or cross-sector outreach?*
- *Now that you’ve been back in your local community for a month, what additional recommendations or reflections do you have regarding the Collaboration Institute?*
- *What additional technical assistance or other supports would be helpful to you, as you and your colleagues implement these changes and new partnerships in your community?*

Action Plan Results

Many participants interviewed reported that they shared key findings from the Collaboration Institute with their immediate colleagues, although several organizations had trainings or work retreats that prevented them from doing so in the first 30 days. One organization **immediately reached out beyond their traditional volunteer base** (congregations) to a pair of **businesses**, which—surprisingly to them—generated **10 new volunteers** to within the first two weeks. Those volunteers are now supporting recent TANF participants who have obtained jobs and are working in Texas, by assisting them in their transition. Other participants worked with the Collaboration Institute’s volunteer facilitator to contact the local chapter of the **Hands-on Network** or **Corporation for National and Community Service**, resulting in new partnerships or assigned staff from **AmeriCorps Vista**. Many attendees spoke about how valuable they felt this session was, in that it offered new perspective on the ways volunteers can support an organization—even a government agency. Several TANF agencies shared this strategy with

their agency directors, and some planned to reach out to a local Hands-On Network chapter. Elsewhere, to recruit new volunteers one community-based partner contacted a local **radio station**, which is now helping them communicate their mission in order draw in new support from local faith-based congregations.

Following the Collaboration Institute training, a community partner in Wyoming developed its **resources database** by building a **detailed community asset map** in partnership with a local college professor and several students. A for-profit business agreed to donate some of its technology to help this program strengthen its database, which is sophisticated enough to allow outside partners—including faith-based and community organizations—to upload their own information and have it immediately accessible on the database. Additionally, this new technology allows for detailed **participant tracking**, which will allow the program to **interface more strategically with TANF strategies**, in partnership with TANF case managers. Finally, as a result of the Collaboration Institute, this particular program also plans to develop **performance-based MOUs** with several new partners.

A number of local TANF officials who participated in the Collaboration Institute shared that their overall learning and action plans prioritized new kinds of partnerships with the community-at-large or other agencies, although in some cases, staff trainings and off-site meetings delayed initial implementation of the plans. To achieve the goal of drawing in **faith-based congregations to mentor or support some of the “hardest-to-serve” TANF participants** not currently working, strategies such as reaching out to a 6000-member congregation to ask for support from volunteer mentors have been developed. Other TANF directors prioritized finding outside community partners—including both **businesses** and grassroots community organizations—that could help find **employment for at-risk youth**. One TANF agency reached out to **Volunteers of America**, a local **homeless shelter** and **AmeriCorps**—all in an effort to boost its partnerships and as a direct result of suggestions during the Collaboration Institute. “We liked the ideas presented and, while we have some partnerships in place already, we realized we could do a lot more to work with our community.”

Post-Institute Changes

In terms of concrete changes since the Denver Collaboration Institute, participants noted new levels of **volunteer involvement**, new strategies for “getting the word out” about opportunities to serve, as well as new outreach to agencies and organizations with a shared interest in supporting low-income families or individuals.

As in other settings, the partners who attended the Denver Collaboration Institute reflected various levels of collaboration history. Some participants—such as Lutheran Family Services, which is developing a new relationship with New Mexico’s TANF and Refugee Resettlement program—used this meeting to learn new approaches to partnering, and **build initial trust**. This program had a history of using MOUs, but anticipated introducing a more **performance-based approach** as a result of the session on structuring partnerships. Others organizations, such as an Oklahoma faith-based tutoring program (Whiz Kids) and an Arkansas faith-based homeless shelter and job-training program (Our House), had considerably deeper TANF partnerships underway. Whiz Kids draws upon over **1,000 volunteers per year** to provide

reading and other tutoring supports for elementary school students of TANF families, as well as basic healthcare—and they have a longstanding \$300,000 contract to serve 900 kids per week. As a result of the Collaboration Institute, however, their executive director has begun using the **media** to promote poverty awareness, by “giving **presentations in local churches** since, like you told us, sometimes all you really have to do is **ask people directly** to help.”

Similarly, with its 58-person staff team, the community-based program Our House is currently nearing the end of a **two-year Department of Workforce Services contract**, and has worked with its local TANF agency for almost a decade. Following the Collaboration Institute, they are cultivating a **partnership with a small group of business experts** from a large Arkansas congregation, which brings “a high-level brain trust” and business expertise to help the long-range Our House Capital Campaign. The principles undergirding the emerging partnership recognize that “it makes more sense for volunteers to work from their own expertise, rather than have CEOs painting a wall,” the Executive Director described.

The break-out sessions for TANF agencies and FBCOs helped some organizations to rethink their **staffing structures**. One organization, for instance, realized the Executive Director was handling “literally every program’s supervision,” when in fact, new hires could fulfill some of the basic human resource and administrative responsibilities. As a result, a community-based partner **changed its published job description** after returning to their community, so that the new hire would report to a different department, and bring additional administrative expertise. Other organizations leveraged their learning about **place-based strategies** to integrate this thinking into a **community-asset map** that tracks participants experiences, involves volunteers from communities where the need is greatest, and presents their collaborative work with a TANF agency in light of a **detailed six-county map**. Another community-based organization talked about how their local TANF agency’s budget cuts led them to develop a class on “**couponing**,” so as to encourage program participants to “become more creative” in budgeting, using food stamps, and moving toward self-sufficiency.

Since numerous participants expressed interest in working with this year’s emerging group of new Healthy Marriage and Responsible Fatherhood programs, several local TANF agencies and two new faith-based or community organizations signed up for the **Welfare Peer TA Network’s listserv**. This practical bi-weekly posting offers technical assistance opportunities and funding announcements, and for a number of Collaboration Institute participants, it was another helpful new resource.

Overall Reflections and Future Support

Participants indicated that they were quite pleased overall with the Collaboration Institute, as the evaluations indicate. Multiple participants referenced the usefulness of having all the materials on the **flash drive**, which they could share with colleagues who did not attend the event. For community partners, the **organizational assessment** was particularly helpful, and several executive directors shared the resource with their Board of Directors or other staff members.

When asked about concrete ways of strengthening the event, both TANF agency leaders and community-based partners expressed interest in **“hearing more about what some of the other organizations were doing—especially in partnership.”** One program leader felt her longstanding experiences **“working out the kinks of a 12-year TANF relationship”** were not able to emerge in conversation, since the schedule was so full. Others asked about the possibility of **meeting as a Region**, with the Region’s other state directors, local partners and Regional Director, since the experience of **“knowing where our Regional Director really wants to go”** was so rare. And for some of the newer faith-based organizations and community partners, several grassroots leaders asked if they could have **“a deeper window into what a ‘fully functional partnering TANF office’ wants, given federal priorities”**—perhaps by one effective TANF agency describing what they do, and how they are open to further partnerships within the confines of the law.

Numerous participants said they appreciated the **networking opportunities** and had stayed in touch via email with other participants. When a pair of organizations realized they **“matched”** in their level of partnership, for example, one state-funded program sent their **Memorandum of Understanding (MOU)** to a Wyoming agency, which used as a basis for a forthcoming MOU. Others from Arkansas, Colorado, and Louisiana had also been in touch with other participants via email.

A director of a faith-based organization did raise the distinction between **“nodding your head and signing a piece of paper saying you consent to the federal rules and regulations regarding proselytizing,”** on the one hand, and **“the heart motivations of some of your faith-based volunteers,”** on the other. She felt the Collaboration Institute introduced these themes but might have developed them more practically, given the number of volunteers her organization employs. Similarly, another highly experienced community organization said that, with 140 MOUs currently in place with a wide array of community partners, the level of dialogue could have been more advanced—or that perhaps we could gather together at some point the **FBCOs that had “a similar level of partnership development,”** so they could exchange recommendations **“in more of a peer-to-peer type setting.”**

In general, the Denver Institute’s faith-based and community organizations as well as TANF directors said they appreciated the opportunity to meet with other practitioners, and found the content very useful. Leaders in the field said they also appreciated our 30-day calls, since it gave them a chance **“to be held accountable to what we said we would do,”** as one TANF director described. **“In fact, could you call us back in another 30 days, to check in again about where we stand on our action plan?”**

Figure 1 – Denver 30-Day Follow-Up Call Participants

Participant	Title	Organization and State	Call Date
Brenda Harrist	Workforce Program Manager	Workforce Solutions, Texas	8/29/11
Kathryn Arnold	Executive Director	Family Pathfinders, Texas	8/29/11
Corrine Livers	TANF Program Manager	Dept. of Social Services, Wyoming	8/29/11
Ann Elmore	Chief Operating Officer	SW-WRAP, Wyoming	8/29/11
Cathie Hughes	Chief Executive Officer	SW-WRAP, Wyoming	8/29/11
James Horan	Division Director	Lutheran Family Services, Colorado	8/30/11
Masie Bross	Director	Whiz Kids Program, CityKids, Oklahoma	8/31/11
Clevon Young	Executive Director	Arkansas Human Development Corporation	9/1/11
Gerald Dyer	Regional Community Specialist	Department of Children’s Assistance, Louisiana	9/2/11
Myron Berzas	Program Manager	Department of Children’s Assistance, Louisiana	9/2/11
Wardell Coward	Community Partner	Waking Up, Inc.	9/2/11
Georgia Mjartan	Executive Director	Our House, Inc.	9/6/11

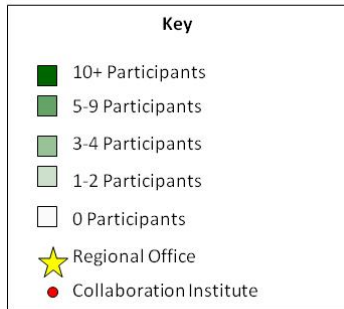
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Region IV

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Region IV Meeting Attendance

Region IV Participants



Regional TANF Offices

- U.S. Department of Health and Human Services, Administration for Children and Families, Office of Family Assistance -Region IV

State TANF Offices

- Georgia Department of Human Services
- Mississippi Department of Human Services
- North Carolina Department of Health and Human Services/Division of Social Services
- South Carolina Department of Social Services
- State of Florida, Department of Children and Families

Local TANF Offices

- Fulton County Department of Families and Children Services
- Greenville County Department of Social Services

Faith or Community Based Organizations

- Harvest Food and Outreach, Community Food & Outreach Center- Orlando
- Housing for New Hope
- Midtown Partners, Inc.
- Second Harvest Food Bank of Central Florida
- South Carolina Center for Fathers and Families
- Upstate Fatherhood Coalition
- Urban Ministries of Durham

* Participants include ACF Regional Staff , State and Local TANF Representatives and FBCO Representatives

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TANF Faith-Based Community Partnerships Collaboration Institute

AGENDA

TUESDAY, AUGUST 16, 2011

Overview

This Collaboration Workshop will share key readiness factors and capacities necessary to establish strong partnerships between TANF agencies and local Faith-Based and Community Organizations. Leaders from both sectors will strategically outline how they can work together to deliver improved services to enhance the entire economic self-sufficiency experience for low-income families and develop functional collaboration plans.

8:30 a.m. – 9:00 a.m.

Registration

9:00 a.m. – 9:20 a.m.

Welcoming Remarks /Introductions

Eric Blanchette, Acting TANF Program Manager
Office of Family Assistance, Administration for Children and Families,
Region IV

Carlis V. Williams, Regional Administrator
Administration for Children and Families, Region IV

Moderator: Robyn Cenizal, Senior Manager
ICF International

9:20 a.m. – 9:40 a.m.

TANF-FBCO Collaboration Overview

Review materials and flow for the day, clarifying how activities/topics link in preparation for action planning and follow-up.

Overview of the Analytical Report highlighting Charitable Choice, Place-based Strategies and Collective Impact

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenter: Josh Good, Technical Specialist
ICF International



TANF Faith-Based Community Partnerships Collaboration Institute

9:40 a.m. – 10:50 a.m.

The Importance of Volunteers

This session will highlight different types of volunteers and provide tips for building organizational capacity utilizing volunteers. The participants will be provided information to strengthen their understanding of volunteer management and identify capacity building resources related to volunteers. Both the TANF and FBCO perspectives regarding volunteer management will be explored.

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenters: Gary Renville, Vice President
HandsOn Network

Nancy Anderson, State Program Specialist
Corporation for National and Community Service

10:50 a.m. – 11:00 a.m.

BREAK

11:00 a.m. –12:15 p.m.

Organizational Infrastructure Break-Out Session

Session A for FBCO Leaders

Focused discussion topics will include: organizational assessment; staffing structure, defined roles and responsibilities, written job descriptions, administrative capacity to track data, delineation between religious and social programming, and working with intermediaries.

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenter: Josh Good, Technical Specialist
ICF International



TANF Faith-Based Community Partnerships Collaboration Institute

Session B for TANF Leaders

Focused discussion topics will include: collaboration readiness assessment; creating a collaborative culture, dedicated staff, internal policies, and coordinating the co-location of services.

Moderator: Louisa Jones, Senior Project Manager
ICF International

Presenter: Francine Delgado, Senior Vice President
Seedco

12:15 p.m. – 1:45 p.m.

Interactive Lunch Session

Over a working lunch, targeted table topics will be discussed.

Partnership Highlights from the Room

Partner groups from each state will have the opportunity to share a five minute presentation about their partnerships including the nature of the partnerships and any successes and challenges they have faced.

Moderator: Louisa Jones, Senior Project Manager
ICF International

1:45 p.m. – 3:00 p.m.

Inter-agency Communication

Discussion topics will include Initiating partnerships, memoranda of understanding, performance based contracts, ongoing communication strategies, and written protocols.

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenters: Gilda Kennedy, Program Coordinator II
South Carolina Department of Social Services

Patricia Littlejohn, Executive Director
South Carolina Center for Fathers and Families

3:00 p.m. –3:15 p.m.

BREAK



Administration for Children and Families, Office of Family Assistance, Region IV

TANF Faith-Based Community Partnerships Collaboration Institute

3:15 p.m. – 4:30 p.m.

Action Planning

Participants will use information gathered throughout the Collaboration Institute to map their community's needs and develop Action Plans.

Facilitator: Penny Tinsman, Senior Project Manager
ICF International

4:30 p.m. – 4:45 p.m.

Closing Remarks and Next Steps

Closing Remarks

Next Steps – 30-day Follow-up, Webinars, etc.

Collaboration Institute Survey

Presenters: Eric Blanchette, Acting TANF Program Manager
Office of Family Assistance
Administration for Children and Families, Region IV

Robyn Cenizal, Senior Manager
ICF International

TANF Faith-Based and Community Partnership Collaboration Institute Evaluation: Atlanta, Georgia

Region IV – Atlanta, GA August 16, 2011	Percentage Respondents Agree or Strongly Agree
Section 1: TANF-FBCO Collaboration Overview	
I have a better understanding of Charitable Choice and its implications for TANF/Faith Partnerships. (n=24)	100.0%
I have a better understanding of Readiness Factors and organizational capacity as defined in the Analytical Report. (n=24)	83.3%
Section 2: Volunteer Management	
I have a better understanding of different types of volunteers and using volunteers to build organizational capacity. (n=24)	91.7%
I have a better understanding of volunteer management. (n=24)	91.7%
I found the Volunteer Position Development Activity helpful. (n=24)	95.8%
I found the funding information helpful. (n=23)	78.3%
Section 3: Organizational Infrastructure	
I have an increased awareness of the importance of appropriate organizational infrastructure including having defined roles and responsibilities, written job descriptions and written policies related to administrative oversight. (n= 24)	95.8%
I better understand the importance of administrative capacity to track data and use data to inform program decisions and measure outcomes. (n=24)	91.7%
I better understand the importance of creating a collaborative culture that actively seeks and nurtures partnerships including dedicated staff, strategic internal policies and consideration of co-locating services. (n=24)	91.7%
I found the Staffing Plan Activity helpful. (n=23)	78.3%
I found the Organizational Self-Assessment (FBCOs) helpful. (n=23)	78.3%
I found the Collaboration Assessment (TANF Office) helpful. (n=22)	90.9%
Section 4: Table Topic Lunch Discussion	
The table topic discussion was helpful as preparation for the Action Planning afternoon session. (n=24)	91.7%
Section 5: Interagency Communication	
I learned new strategies for initiating and maintaining win-win collaborative partnerships. (n=24)	83.3%
I better understand the distinctions and appropriate uses of Partnership Agreements, Memorandum of Understanding (MOU) and Performance Based Contracts. (n=24)	79.2%
I learned new strategies for overcoming communication barriers and developing inter-agency communication protocols. (n=24)	75.0%
The Partnership Agreement (Community Partner Activity) was helpful. (n=24)	83.3%

Region IV – Atlanta, GA August 16, 2011	Percentage Respondents Agree or Strongly Agree
I better understand concepts related to community asset mapping and action planning as capacity building strategies. (n=23)	95.7%
I better understand concepts related to community asset mapping and action planning as capacity building strategies. (n=24)	87.5%
The Community Asset Map (Community Partner Activity) was helpful. (n=24)	87.5%
The Action Plan: Ideas for Action (Community Partner Activity) was helpful. (n=23)	95.7%
Overall	
The Collaboration Institute provided information that will be beneficial to my work. (n=24)	95.8%
I would recommend this event to other TANF/FBCO groups wanting to collaborate. (n=23)	95.7%

Comments

Which presentation/activity was most helpful and why:

Overall

- Volunteer management, manual example, action plans
 - *Great information*
- The table partner discussions and the action plans.
 - *It allowed us to get into more detail about what partner agencies do and what they can do.*

Volunteer Management

- Importance of volunteers
 - *Gained knowledge on volunteer resources*
- Planning volunteer work part!
 - *Useful*
- The information shared on volunteer agencies by AmeriCorps and collaboration projects shared by the States.
 - *It was new and very informative hearing what States are doing.*
- Volunteer Management
 - *It gave me a different way to look at using volunteers.*
- Volunteer Management
 - *Learning insights into what other agencies are doing to utilize volunteers in their States, partnering with an agency to incorporate volunteers.*

Organizational Infrastructure

- Organizational Infrastructure
 - *I learned more about what makes successful partnerships*
- Organizational Infrastructure

- *Importance of detailed, specific MOU- services to be provided, roles and responsibilities of each party, screening criteria*
- The MOU training
 - *This is necessary to formalize collaboration and clarify roles*
- Organizational Self-Assessment
 - *Items on it didn't know answer to and need to find the answer to in order to improve organization*

Interagency Communication

- Interagency Communication
 - *It reinforced the need to communicate to always be on the same page.*
- Interagency Communication
 - *Information was (useful) user friendly in terms of my current position.*

Action Planning

- Beach ball
 - *Very active and to the point.*
- Building the relationship with other services to provide wrap around (beach ball)
- Section 6: Action Planning
 - *It defines what you are going to do, and how it will be done.*
- Beach ball activity and the Action Plan
 - *The beach ball activity was a good visual example on how effective we can be working together. The Action Plan helps focus on what we need to do.*
- The interactive session (beach ball) activity was very interesting
 - *It helped the group be active and a cleaner understanding on the collaboration effort.*
- Asset Mapping
 - *Helped to see untapped resources*
- Asset-Map (beach ball)
 - *Importance of community partners necessary to meet all needs of the client*

Other

- Section 1
 - *Because I am not completely familiar with TANF restrictions and am more informed*
- Fatherhood
 - *Interest for NC*
- All were very informative.
- Information was helpful.
- The all provided something new and interesting.

Which presentation/activity was least helpful and why:

Volunteer Management

- Volunteer Management
 - *Don't use volunteers in our program.*
- The importance of volunteers.
- Wished volunteer presenter discussed how to retain on-going volunteers and engage volunteers for needed help (most want to do outreach and not admin help)

Action Planning

- Action Planning
 - *Requires that those at the table are intimately collaborating and we are not.*

Other

- Activity to complete the worksheet on potential.
- Staffing
 - *No new knowledge gained*
- Lunch
 - *I'm on a diet*
- Interagency Communication
 - *We presented this section*

30-Day Follow-up Report: Atlanta Collaboration Institute

This report summarizes feedback from participants in Mississippi, North Carolina, South Carolina, Florida, Alabama, and Georgia—including both Temporary Assistance for Needy Families (TANF) officials and their community-based or faith-based (FBCO) partners—who attended the TANF-FBCOs Collaboration Institute meeting in Atlanta, Georgia on August 16, 2011. Senior staff from ICF International conducted **five (5) sets of 60-minute calls** to ascertain the current status of the “action plans” developed by those who took part in the Atlanta meeting. Whenever possible, steps were taken to convene both TANF leaders and their FBCO partner on the same call. A full list of those who participated in these calls is included as Figure 1 (see below). For each of these calls, ICF gathered baseline feedback for each of the following questions:

- *Have you shared your action plan with other members of your staff?*
- *Have you discussed your action plan with other organizations?*
- *Have you met in person or convened a call with your FBCO partner? (Or for the FBCO, have you followed up with your partnering TANF agency?)*
- *What were the three leading elements of your action plan?*
- *What changes, if any, have you made vis-à-vis volunteer management? What changes do you plan to make?*
- *What changes, if any, have you made regarding inter-agency partnership or communication? What are you planning in this area?*
- *What broader changes, if any, have you made as a result of the Collaboration Institute? Are you doing anything in terms of organizational development or cross-sector outreach?*
- *Now that you’ve been back in your local community for a month, what additional recommendations or reflections do you have regarding the Collaboration Institute?*
- *What additional technical assistance or other supports would be helpful to you, as you and your colleagues implement these changes and new partnerships in your community?*

Action Plan Results

Most **participants** had specific, measurable action plans and had implemented at least parts of them since returning to their communities. A partnership in Mississippi developed a **stronger relationship with the Supplemental Nutrition Assistance Program (SNAP)**, using some of the inter-agency collaboration principles as a guide. By **strengthening their existing Memorandum of Understanding (MOU)**, this same group furthered a TANF relationship with Midtown Partners, a community-based agency that provides wraparound supports to low-income families in five at-risk zip codes.

Similarly, in Georgia one participating TANF office forged a **new partnership with the Atlanta Prosperity Campaign and the Atlanta Community Food Bank**. The primary goal for TANF case managers following up with these two organizations is to support 1,200 work-experience TANF participants currently involved in subsidized employment, and to offer new supports to a group of just under 500 disabled TANF clients. Both organizations are new partners with the TANF

agency, which is seeking to use principles from the Collaboration Institute to guide its evolving relationship.

In Florida, one community-based participant is forging **new connections with local workforce agencies**, and a TANF office lead is developing a large **compilation of community needs**, particularly in three cities where the agencies want to expand connections with faith-based and community organizations. One organization that participated has since gone through all the material on the Collaboration Institute's **flash drive**, using it to systematically consider how local agency contacts could also benefit from the material presented during the Institute. Additionally, both the community-based organization and TANF agency **use volunteers**, through a Corporation for National and Community Service contact and a court-ordered and workforce-mandated arrangement in partnership with the local Welfare-to-Work initiative.

North Carolina has an extensive set of Memoranda of Understanding between its TANF office and local partners, and in the wake of the Collaboration Institute its participants have **strengthened several MOUs**. Specifically, they have cultivated a new relationship with **external organizations providing vocational rehabilitation** and another partnership around **support for housing homeless families**. Both TANF agency leaders and a local community partner also have interest in partnering (or even **subcontracting**) **with any Pathways to Responsible Fatherhood grantees from North Carolina**, once those awards are made at the start of the new fiscal year.

In South Carolina, a local fatherhood and family-strengthening program reached out to a **family foundation** shortly after the Collaboration Institute, to encourage private support that could strengthen the relationship between TANF families and this community-based non-profit. Similarly, this organization has initially reached out to its local **Workforce Investment Agency**, and hopes to deepen that collaboration in the coming months. With a longstanding partnership history and an **existing MOU**, the local TANF agency and community-based organization recommitted to **strong communication and ongoing partnership**, perhaps involving a workforce agency or a new Pathways to Responsible Fatherhood grantee from their state. In short, most partners had made at least initial—and in some cases substantial—progress on implementing their action plans.

Post-Institute Changes

Several TANF agencies and faith-based and community organizations have made concrete changes since the Institute—particularly in the areas of **volunteering and inter-agency communication**. Others, however, indicated during these follow-up calls that they plan to make changes in connection with the start of the new fiscal year, based on year-end obligations that have been a hindrance to early progress.

For example, one community-based partner has decided in partnership with its Board that it will increasingly work **across various public agencies**, rather than with the TANF agency alone. An upcoming Board retreat will focus on concrete steps to broaden connections to WIA, Child Support, WIC and other programs. Another organization reported that it wanted to recruit

volunteers to support its work with **hard-to-serve populations like ex-prisoners and unemployed TANF clients** who have exceeded five years of public support.

Two participating organizations reported that the topics raised by the Collaboration Institute helped them learn new ways their “partner” organization worked. For instance, one faith-based organization was surprised to learn the local TANF agency employed at least one **volunteer** from both the nearby **community college** and the **Corporation for National and Community Service**.

Another community partner shared that it was currently “**revamping their job description for the position of volunteer coordinator**,” to expand that role considerably in light of the Collaboration Institute’s session on that topic. Separately, a non-profit housing organization reported that it would be sharing the **organizational assessment** used during the Institute with its full Board of Advisors, asking them to complete the assessment during an upcoming meeting.

Another organization had begun **partnering with a local mental health agency**, which recently held a summit to encourage broader voluntarism and involvement by the faith community. Themes from the Collaboration Institute helped support that two-day initiative, particularly the connections to the **HandsOn Network** and broader thinking about “**actually asking volunteers directly**” for support.

Given the timing of upcoming grant announcements, most of the TANF agencies or local partners interested in collaborating with new Pathways to Responsible Fatherhood grantees reported that those partnerships would need to wait until Fall 2011, when those programs were expected to get underway.

Overall Reflections and Future Support

While the evaluations offer some insights about participant experiences at the Collaboration Institute, TANF agency leaders and community-based practitioners were also invited to share their overall reflections and suggestions about this meeting—as well as ways they might appreciate ongoing support. Generally, they were quite positive, although did have some suggestions. For example one local TANF agency asked if we could **share research or practical recommendations about ways to recruit community-based partners “that had no relationship in the past with a federal agency.”** What practical steps could TANF leaders take to help convince them to connect with federal programs like TANF, SNAP, Child Support, and workforce agencies?

Another participant described that “the day felt a little like drinking from a fire hydrant” and requested if these meetings again take place to get an **agenda in advance**, showcasing some of the lead ideas, so that the **risk of “information overload” was diminished**. Perhaps one way “to spread out the volume of what we were learning” would be to write one component of the **action plan** after the volunteer session, and another after the inter-agency communication

section—in other words, **breaking up our action plan-writing “so we could build things one unit at a time,”** another participant suggested.

One partner that had been inundated with end-of-year obligations and the approaching new fiscal year said they would appreciate **“another follow-up call, maybe 60 days from now, to help keep us accountable with our action plan.”** Another TANF-community partnership echoed this request, describing how their efforts to reach out to **volunteer organizations** and **faith-based groups** “took time, so we’d appreciate **guidance** in developing these partnerships, once they get further off the ground.”

Additionally, several participants noted their appreciation for the **flash drive**, since it contained all the tools used during the Collaboration Institute—and tools that could therefore be shared with staff and local partners.

There was also interest in **“breaking up the table groups”** to cultivate different kinds of discussion, “not just with our partners but with other organizations from other states who are like us—who we could learn something from,” as one participant described. Nonetheless, this participant noted that the overlap just prior to the lunch discussion, as well as the coffee breaks, offered helpful opportunity for this kind of informal networking.

As to further support for local partnerships, one TANF official asked if we could host a meeting like this “at the local level,” so that the Department of Social Services office could host a gathering of “lots of community partners. **Could you provide us with a blueprint for how to invite and host local partners?**” This participant’s suggestion was that “all change is local,” and that these themes could potentially translate into local action—particularly if we could support them with a template for leading a local meeting that developed some of these themes.

Finally, another partnering organization asked if we could **compile information** about how participants were taking practical steps to follow-up after the Institute. If, for example, “another organization like ours was able to find a Pathways to Responsible Fatherhood grantee and go in with them, could you let us know how they did it?” **Sharing concrete examples** about some of the most effective ways Collaboration Institute participants integrated their action plans could potentially spur on other participants to replicate these successes in their own communities.

Figure 1 – Atlanta 30-Day Follow-Up Call Participants

Participant	Title	Organization and State	Call Date
Vera Butler	Director	Dept. of Health and Human Services, MS	9/13/11
Sandra Giddy	Projects Officer	Dept. of Human Services, MS	9/13/11
Dr. Kristi Hendrix	Executive Director	Midtown Partners, Inc., MS	9/13/11
Kimberly Knight	Executive Coordinator	Midtown Partners, Inc., MS	9/13/11
Frances Johnson	County Supervisor	Dept. of Human Services, MS	9/13/11
Ann Carter	TANF Unit Manager	Dept. of Human Resources, GA	9/15/11
Kelly Walker	Executive Director	Upstate Fatherhood, GA	9/15/11
Ruth Travis	TANF Program Field Specialist	Fulton Co. Dept. of Family and Children's Services, GA	9/15/11
Janet Foggs	Government Operations	Department of Human Services, FL	9/15/11
Austin Hunt	Chief Executive Officer	Harvest Food and Outreach IRC, FL	9/15/11
Cathy Kenyon	Chief of Operations	Dept. of Human Services, FL	9/15/11
Johnice Tabron	Social Services Regional Manager	DHHS Division of Social Services, NC	9/15/11
Rhonda Stephens	Assistance Director for Family Economic Independence	Durham Co. Dept. of Social Services, NC	9/15/11
Terry Allebaugh	Executive Director	Housing for New Hope, NC	9/15/11
Pat Littlejohn	Executive Director	SC Center for Fathers and Families, SC	9/21/11
Gilda Kennedy	Program Coordinator	Dept. of Social Services, SC	9/21/11

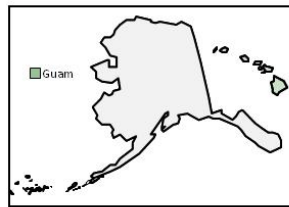
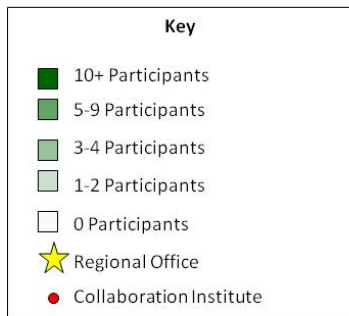
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Regions IX and X

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Regions IX and X Meeting Attendance

Regions IX and X



Regional TANF Offices

- Administration for Children and Families, Office of Family Assistance, Region IX and X

State TANF Offices

- Arizona Department of Economic Security
- Department of Social Services, California
- Dept. of Public Health & Social Services, Division of Public Welfare, Bureau of Economic Security
- DPHSS/DPW/Work Programs Section
- State of Hawaii - Department of Human Services
- Nevada State Welfare Division
- Oregon Department of Human Services
- Department of Human Services
- Department of Social and Health Services
- Associated Ministries
- Community Services Division, DSHS, WA State

Local TANF Offices

- Health and Human Services Agency, San Diego County
- Pierce County

Faith or Community Based Organizations

- Metro United Methodist Urban Ministry
- Center for Micronesia Empowerment
- Goodwill - Job Connection

* Participants include ACF Regional Staff, State and Local TANF Representatives and FBCO Representatives

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TANF Faith-Based Community Partnerships Collaboration Institute

AGENDA

TUESDAY, September 20, 2011

Overview

This Collaboration Workshop will share key readiness factors and capacities necessary to establish strong partnerships between TANF agencies and local Faith-Based and Community Organizations. Leaders from both sectors will strategically outline how they can work together to deliver improved services to enhance the entire economic self-sufficiency experience for low-income families and develop functional collaboration plans.

8:30 a.m. – 9:00 a.m.

Registration

9:00 a.m. – 9:20 a.m.

Welcoming Remarks /Introductions

Julie Fong, TANF Program Manager
Office of Family Assistance
Administration for Children and Families, Region IX

Moderator: Robyn Cenizal, Senior Manager
ICF International

9:20 a.m. – 9:40 a.m.

TANF-FBCO Collaboration Overview

Review materials and flow for the day, clarifying how activities/topics link in preparation for action planning and follow-up.

Overview of the Analytical Report highlighting Charitable Choice, Place-based Strategies and Collective Impact

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenter: Josh Good, Technical Specialist
ICF International



TANF Faith-Based Community Partnerships Collaboration Institute

9:40 a.m. – 10:50 a.m.

The Importance of Volunteers

This session will highlight different types of volunteers and provide tips for building organizational capacity utilizing volunteers. The participants will be provided information to strengthen their understanding of volunteer management and identify capacity building resources related to volunteers. Both the TANF and FBCO perspectives regarding volunteer management will be explored.

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenters: Gary Renville, Vice President
HandsOn Network

Karen Baker, Secretary of Service and Volunteering
California Volunteers

10:50 a.m. – 11:00 a.m.

BREAK

11:00 a.m. –12:15 p.m.

Organizational Infrastructure Break-Out Session

Session A for FBCO Leaders

Focused discussion topics will include: organizational assessment; staffing structure, defined roles and responsibilities, written job descriptions, administrative capacity to track data, delineation between religious and social programming, and working with intermediaries.

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenter: Josh Good, Technical Specialist
ICF International



TANF Faith-Based Community Partnerships Collaboration Institute

Session B for TANF Leaders

Focused discussion topics will include: collaboration readiness assessment; creating a collaborative culture, dedicated staff, internal policies, and coordinating the co-location of services.

Moderator: Damon Waters, Technical Specialist
ICF International

Presenter: Bill Brumfield, Expert Consultant
ICF International

12:15 p.m. – 1:45 p.m.

Interactive Lunch Session

Over a working lunch, targeted table topics will be discussed.

Partnership Highlights from the Room

Partner groups from each state will have the opportunity to share a five minute presentation about their partnerships including the nature of the partnerships and any successes and challenges they have faced.

Moderator: Damon Waters, Technical Specialist
ICF International

1:45 p.m. – 3:00 p.m.

Inter-agency Communication

Discussion topics will include Initiating partnerships, memoranda of understanding, performance based contracts, ongoing communication strategies, and written protocols.

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenters: Molly Allen Gieson-Fields, Senior Consultant
Seedco

3:00 p.m. –3:15 p.m.

BREAK



Administration for Children and Families, Office of Family Assistance, Regions IX & X

TANF Faith-Based Community Partnerships Collaboration Institute

3:15 p.m. – 4:30 p.m.

Action Planning

Participants will use information gathered throughout the Collaboration Institute to map their community's needs and develop Action Plans.

Facilitator: Penny Tinsman, Senior Project Manager
ICF International

4:30 p.m. – 4:45 p.m.

Closing Remarks and Next Steps

Closing Remarks

Next Steps – 30-day Follow-up, Webinars, etc.

Collaboration Institute Survey

Presenters: Earl S. Johnson, Ph.D., Director
Office of Family Assistance

Julie Fong, TANF Program Manager
Office of Family Assistance
Administration for Children and Families, Region IX

Robyn Cenizal, Senior Manager
ICF International

TANF Faith-Based and Community Partnership Collaboration Institute Evaluation: San Francisco, California

Regions IX and X – San Francisco, California September 20, 2011	Percentage Respondents Agree or Strongly Agree
Section 1: TANF-FBCO Collaboration Overview	
I have a better understanding of Charitable Choice and its implications for TANF/Faith Partnerships. (n=17)	88.2%
I have a better understanding of Readiness Factors and organizational capacity as defined in the Analytical Report. (n=17)	82.4%
Section 2: Volunteer Management	
I have a better understanding of different types of volunteers and using volunteers to build organizational capacity. (n=17)	100.0%
I have a better understanding of volunteer management. (n=17)	82.4%
I found the Volunteer Position Development Activity helpful. (n=17)	82.4%
I found the funding information helpful. (n=17)	70.6%
Section 3: Organizational Infrastructure	
I have an increased awareness of the importance of appropriate organizational infrastructure including having defined roles and responsibilities, written job descriptions and written policies related to administrative oversight. (n= 17)	94.1%
I better understand the importance of administrative capacity to track data and use data to inform program decisions and measure outcomes. (n=17)	88.2%
I better understand the importance of creating a collaborative culture that actively seeks and nurtures partnerships including dedicated staff, strategic internal policies and consideration of co-locating services. (n=17)	94.1%
I found the Staffing Plan Activity helpful. (n=17)	88.2%
I found the Organizational Self-Assessment (FBCOs) helpful. (n=15)	66.7%
I found the Collaboration Assessment (TANF Office) helpful. (n=17)	88.2%
Section 4: Table Topic Lunch Discussion	
The table topic discussion was helpful as preparation for the Action Planning afternoon session. (n=17)	76.5%
Section 5: Interagency Communication	
I learned new strategies for initiating and maintaining win-win collaborative partnerships. (n=17)	70.6%
I better understand the distinctions and appropriate uses of Partnership Agreements, Memorandum of Understanding (MOU) and Performance Based Contracts. (n=17)	82.4%
I learned new strategies for overcoming communication barriers and developing inter-agency communication protocols. (n=17)	76.5%
The Partnership Agreement (Community Partner Activity) was helpful. (n=16)	62.5%

Regions IX and X – San Francisco, California September 20, 2011	Percentage Respondents Agree or Strongly Agree
Section 6: Action Planning	
I better understand concepts related to community asset mapping and action planning as capacity building strategies. (n=16)	87.5%
I better understand concepts related to community asset mapping and action planning as capacity building strategies. (n=17)	70.6%
The Community Asset Map (Community Partner Activity) was helpful. (n=16)	87.5%
The Action Plan: Ideas for Action (Community Partner Activity) was helpful. (n=16)	87.5%
Overall	
The Collaboration Institute provided information that will be beneficial to my work. (n=16)	100.0%
I would recommend this event to other TANF/FBCO groups wanting to collaborate. (n=16)	100.0%

Comments

Which presentation/activity was most helpful and why:

Volunteer Management

- The topic addressing volunteer management
 - *It presented to me different types of volunteer activities and partnerships that the state has not considered*
- Volunteer discussion/ hearing from other states
 - *Generates new ideas for me to follow up on*

Organizational Infrastructure

- Organizational Infrastructure
 - *More prepared than I thought*

Table Top Discussion

- Table top discussion
 - *We heard, discussed real issues, obstacles and successes.*
- State Reports
- Partner sharing
 - *New ideas*
- Hearing from other states on what has worked and ideas for engaging FBCOs to provide the best service to our clients

Action Planning

- Action Planning/Asset Mapping
 - *Helped me think of potential partners to ensure the success of my goal for the program and its impact on our participants.*
- Action planning
 - *Very informative for those ready to take the next steps, great presenter too!*
- Action planning- great presenter, great section!

Other

- Learning about different entities we could partner up with
- Self-assessment, planning tools
- Funding resources
 - *NGO typically have difficulty implementing its programs without funding*
- TANF-FBO Collaboration Overview
 - *Learn how partnerships assist TANF objectives*
- All the presentations/discussions were relevant to expanding services without additional funding
- All presentations were extremely relevant

Which presentation/activity was least helpful and why:

Interagency Communication

- Interagency communication
 - *There was a lot of lecture and some of the info was lost. More examples of data sharing would have been nice*
 - *While informative and well presented it did not give good examples of what works, pitfalls to avoid, etc.*
 - *Too remedial*
 - *Talk too long, boring. It seemed objective not clear or relevant to me.*
- SEEDCO
 - *Confusing, hard to follow and understand what they do*
- Intermediary discussion
 - *Needed to cover more basics to communicate, etc.*

Table Top Discussions

- The partner sharing sessions were and weren't helpful
 - *Would have liked more instructions on preparing so that we had apples to apples comparisons*

Action Planning

- Yarn game
 - *Dislike things thrown- I am intelligent enough to get message without game*

Other

- Staffing planning activity

Additional Comments:

- This workshop in addition to the regional meeting! Hope to see the follow up on the plans presented next year that identify successes, challenges, lessons learned.
- TANF Reauthorization- need to redesign TANF program to focus less on process (participation in WE, SW, etc) and more on outcomes (employment, finding jobs)
- WIA Reauthorization- agree that there needs to be incentives to work w/ TANF population.

30-Day Follow-up Report: San Francisco Collaboration Institute

This report summarizes feedback from participants in California, Oregon, Washington, Guam and Hawaii—including both TANF officials and their community-based partners—who attended the initial TANF-FBCOs Collaboration Institute meeting in San Francisco. ICF conducted **four sets of 60-minute calls** to determine the current status of the “action plans” developed by those who attended this Collaboration Institute, which was hosted on September 20, 2011. Whenever possible, steps were taken to convene both TANF leaders and their faith-based or community-based partner on the same call (although in some cases, this was not possible due to participant scheduling difficulties). A full list of those who participated in these calls is included in Figure 1. For each call, ICF gathered baseline feedback for each of the following questions:

- *Have you shared your action plan with other members of your staff?*
- *Have you discussed your action plan with other organizations?*
- *Have you met in person or convened a call with your FBCO partner? (Or for the FBCO, have you followed up with your partnering TANF agency?)*
- *What were the three leading elements of your action plan?*
- *What changes, if any, have you made vis-à-vis volunteer management? What changes do you plan to make?*
- *What changes, if any, have you made regarding inter-agency partnership or communication? What are you planning in this area?*
- *What broader changes, if any, have you made as a result of the Collaboration Institute? Are you doing anything in terms of organizational development or cross-sector outreach?*
- *Now that you’ve been back in your local community for a month, what additional recommendations or reflections do you have regarding the Collaboration Institute?*
- *What additional technical assistance or other supports would be helpful to you, as you and your colleagues implement these changes and new partnerships in your community?*

Action Plan Results

Most participants interviewed reported that they have shared key findings from the Collaboration Institute with their staff teams, including supervisors as well as line staff. Several participants had engaged workforce agencies or other community partners with principles from the Collaboration Institute, including new outreach with STRIVE programming in Hawaii and forming a working group across DOL- and HHS-sponsored agencies in another setting. One community partner noted the value of the Welfare Peer TA Web site, which had not been familiar before the Collaboration Institute; already he has shared several resources with partnering organizations.

Oregon officials have also made inroads with workforce agencies, through a Goodwill Industries partnership with a TANF office that is taking a renewed interest in work participation rates and job-training opportunities. The southern region of the state is beginning a new ETA

partnership, and Goodwill is facilitating higher levels of job-preparation opportunities for TANF clients.

In terms of working with volunteers, Multnomah County leaders and Goodwill each expressed interest in furthering their volunteer support. Multnomah County has reached out to the HandsOn Network, and Goodwill uses volunteer interns.

Another TANF leader reported that she appreciated the flash drive resources enough to share them with a group of 16 colleagues from the same district office. Others also expressed appreciation for the resources shared during the Collaboration Institute—particularly the assessment tools and performance-based contracts, which could be used as examples for future work.

Guam's Department of Social Services forged a new relationship with a community-based microenterprise "empowerment" organization that did not attend the Collaboration Institute but stood to benefit from some of its teaching. Guam's Department of Social Services office shared with them and with a local chapter of the Salvation Army the organizational assessment and several other tools. They also worked with another government agency to develop a comprehensive list of available public programs for low-income families on the island, including WIB and One-Stop supports for those looking for employment.

In San Diego, the partnership between a local TANF office and a wide array of faith-based leaders (Metro United) is harnessing the city's interest in "emergency preparedness" as a conduit for increased collaboration. Throughout the city, congregations are being used as networks to organize around supports for displaced families, particularly linked to wildfires. In recent weeks, faith groups have mobilized the community—especially during the first 72 hours, before government agency support has arrived. This has motivated increased collaboration with Metro United.

Another area of collaboration between the TANF agency and Metro United is the support they are giving to Burmese and Iraqi refugees that have flocked to the San Diego area. San Diego has surpassed Detroit in attracting refugees, and it has created real challenges for the community: many newcomers are still mono-lingual (non-English-speaking), still traumatized from the war, and struggle in terms of transitioning back to the community. Corresponding challenges have emerged around public safety, presenting a strong need for ESL classes. Metro United has organized numerous faith-based organizations to provide assistance in helping refugees navigate the MediCal system, promote health, find access to ESL, provide access to SNAP benefits, and introduce WIB supports. Moreover, Metro United's director serves as a lead member of the TANF office's Citizens Advisory Board, and is influential on the County Board of Supervisors—introducing an important leadership/authority element to this innovative partnership.

Final Reflections

Overall, feedback about the Collaboration Institute was generally positive, particularly given current economic difficulties and the challenges TANF agency officials face in meeting work participation rates and other requirements. One attendee suggested sharing with participants something mimicking the RAND Corporation's *Research Trends* short reports. These could highlight innovative practices and summaries of new publications that discuss collaboration between public and private organizations, across a wide array of programs (not just those funded by the Administration and Children and Families).

Figure 1: San Francisco 30-Day Follow-Up Call Participants

Participant	Title	Organization	Call Date
Troy Christianson	Homeless Programs Administrator	Pierce Co. Community Connections	11/10/11
Teri Gillette	Program Manager	Goodwill – Jobs Connection	11/10/11
Carol Lamon	Self-Sufficiency	Oregon DHS, Multnomah County	11/7/11
Lisa Lewis	District Manager	Oregon DHS District Manager	11/7/11
Scott Nakasone	Division Administrator	State of Hawaii DHHS	11/9/11
Christine San Nicholas	Social Services Administrator	Guam Dept. of Social Services	11/8/11
Dale Fleming	Director of Strategic Planning	San Diego Co. DHHS	11/7/11
Karen Dickerson	Branch Chief, Employment and Eligibility	Dept. of Social Services, CA	11/10/11

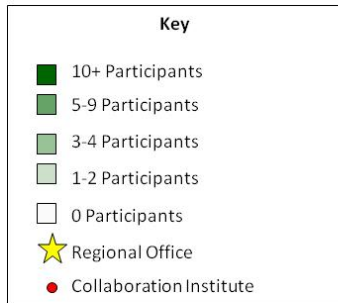
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Regions I, II, and III

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Regions I, II, and III Meeting Attendance

Regions I, II, and III Participants



Regional TANF Offices Represented

- US Department of Health and Human Services, Administration for Children and Families, Office of Family Assistance, Region I, Region II and Region III

State TANF Offices Represented

- Connecticut Department of Social Services
- Delaware Division of Social Services
- Department of Human Services/Economic Security Administration- District of Columbia
- Maryland Department of Human Resources, Family Investment Administration
- Massachusetts Department of Transitional Assistance
- New Hampshire Department of Health and Human Services, Division of Family Assistance
- New Hampshire Department of Health and Human Services, Bureau of Welfare to Work
- New Jersey Department of Human Services
- New Jersey Department of State-Office of Faith Based Initiatives
- Rhode Island Department of Human Services
- Vermont Department of Children and Families
- Vermont Department of Labor
- Virgin Islands Department of Human Services

Local TANF Offices Represented

- Baltimore City Department of Social Services

Faith or Community Based Organizations

- Burlington County Community Action Program
- Catholic Charities, District of Columbia
- Community Family Life Services
- Community Stewardship Program / Open Table of Christ UMC
- Dorcas Place Adult & Family Learning Center
- Dress for Success Hudson County
- Lutheran Social Services of the Virgin Islands, Inc.
- Maryland Food Bank
- Northwestern Counseling and Support Services
- Southern New Hampshire Services, Inc.
- St. Thomas/St. John Fellowship of Ministers
- Vermont Adult Learning
- Vermont Association of Business, Industry, and Rehabilitation
- Vocational Rehabilitation- Vermont

* Participants include ACF Regional Staff, State and Local TANF Representatives and FBCO Representatives

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TANF Faith-Based Community Partnerships Collaboration Institute

AGENDA

Overview

This Collaboration Workshop will share key readiness factors and capacities necessary to establish strong partnerships between TANF agencies and local Faith-Based and Community Organizations. Leaders from both sectors will strategically outline how they can work together to deliver improved services to enhance the entire economic self-sufficiency experience for low-income families and develop functional collaboration plans.

DAY ONE

THURSDAY, NOVEMBER 3, 2011

12:30 p.m. - 1 p.m.

Registration

1 p.m. - 1:20 p.m.

Welcoming Remarks /Introductions

Eileen Friedman, TANF Program Manager
Office of Family Assistance, Administration for Children and Families,
Region III

Moderator: Robyn Cenizal, Senior Manager
ICF International

1:20 p.m. – 1:40 p.m.

TANF-FBCO Collaboration Overview

Review materials and flow for the day, clarifying how activities/topics link in preparation for action planning and follow-up.

Overview of the Analytical Report highlighting Charitable Choice, Place-based Strategies and Collective Impact

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenter: Josh Good, Technical Specialist
ICF International

1:40 p.m. – 2:50 p.m.

The Importance of Volunteers

This session will highlight different types of volunteers and provide tips for building organizational capacity utilizing volunteers. The participants will be provided information to strengthen their understanding of volunteer management and identify capacity building resources related to volunteers. Both the TANF and FBCO perspectives regarding volunteer management will be explored.

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenters: Bernie Beaudreau, Executive Director
Serve Rhode Island



Administration for Children and Families, Office of Family Assistance, Regions I, II, & III

TANF Faith-Based Community Partnerships Collaboration Institute

2:50 p.m. – 3:00 p.m.

BREAK

3:00 p.m. – 4:15 p.m.

Organizational Infrastructure Break-Out Session

Session A for FBCO Leaders

Focused discussion topics will include: organizational assessment; staffing structure, defined roles and responsibilities, written job descriptions, administrative capacity to track data, delineation between religious and social programming, and working with intermediaries.

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenter: Josh Good, Technical Specialist
ICF International

Session B for TANF Leaders

Focused discussion topics will include: collaboration readiness assessment; creating a collaborative culture, dedicated staff, internal policies, and coordinating the co-location of services.

Moderator: Damon Waters, Technical Specialist
ICF International

Presenter: Bill Brumfield, Expert Consultant
ICF International

4:15 p.m. - 4:30 p.m.

Wrap Up Day One



TANF Faith-Based Community Partnerships Collaboration Institute

DAY TWO

FRIDAY, NOVEMBER 4, 2011

8:30 a.m. – 9:15 a.m.

Interactive Session

Over a working breakfast, targeted table topics will be discussed.

Partnership Highlights from the Room

Partner groups from each state will have the opportunity to share a five minute presentation about their partnerships including the nature of the partnerships and any successes and challenges they have faced.

Moderator: Damon Waters, Technical Specialist
ICF International

9:15 a.m. – 10:30 a.m.

Inter-agency Communication

Discussion topics will include Initiating partnerships, memoranda of understanding, performance based contracts, ongoing communication strategies, and written protocols.

Moderator: Robyn Cenizal, Senior Manager
ICF International

Presenters: Carol Monteiro, TANF Program Manager
Office of Family Assistance, Administration for Children
and Families, Region I

Craig Comstock, Program Manager
Reach Up (Vermont)

10:30 a.m.–10:45 a.m.

BREAK

10:45 a.m. – 12:00 p.m.

Action Planning

Participants will use information gathered throughout the Collaboration Institute to map their community's needs and develop Action Plans.

Facilitator: Penny Tinsman, Senior Project Manager
ICF International

12:00 p.m. – 12:30 p.m.

Closing Remarks and Next Steps

Closing Remarks

Next Steps – 30-day Follow-up, Webinars, etc.

Collaboration Institute Survey

Presenters: Mary Ann Higgins, Regional Administrator
Administration for Children and Families, Region I

Robyn Cenizal, Senior Manager
ICF International

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TANF Faith-Based and Community Partnership Collaboration Institute Evaluation: Providence, Rhode Island

Regions I, II, and III – Providence, Rhode Island November 3-4, 2011	Percentage Respondents Agree or Strongly Agree:
Section 1: TANF-FBCO Collaboration Overview	
I have a better understanding of Charitable Choice and its implications for TANF/Faith Partnerships. (n=23)	69.6%
I have a better understanding of Readiness Factors and organizational capacity as defined in the Analytical Report. (n=23)	91.3%
Section 2: Volunteer Management	
I have a better understanding of different types of volunteers and using volunteers to build organizational capacity. (n=24)	91.7%
I have a better understanding of volunteer management. (n=24)	83.3%
I found the Volunteer Position Development Activity helpful. (n=24)	70.8%
I found the funding information helpful. (n=24)	66.7%
Section 3: Organizational Infrastructure	
I have an increased awareness of the importance of appropriate organizational infrastructure including having defined roles and responsibilities, written job descriptions and written policies related to administrative oversight. (n= 24)	87.5%
I better understand the importance of administrative capacity to track data and use data to inform program decisions and measure outcomes. (n=24)	87.5%
I better understand the importance of creating a collaborative culture that actively seeks and nurtures partnerships including dedicated staff, strategic internal policies and consideration of co-locating services. (n=24)	87.5%
I found the Staffing Plan Activity helpful. (n=24)	75.0%
I found the Organizational Self-Assessment (FBCOs) helpful. (n=23)	78.3%
I found the Collaboration Assessment (TANF Office) helpful. (n=24)	79.2%
Section 4: Table Topic Lunch Discussion	
The table topic discussion was helpful as preparation for the Action Planning afternoon session. (n=23)	73.9%
Section 5: Interagency Communication	
I learned new strategies for initiating and maintaining win-win collaborative partnerships. (n=24)	87.5%
I better understand the distinctions and appropriate uses of Partnership Agreements, Memorandum of Understanding (MOU) and Performance Based Contracts. (n=24)	75.0%
I learned new strategies for overcoming communication barriers and developing inter-agency communication protocols. (n=24)	66.7%
The Partnership Agreement (Community Partner Activity) was helpful. (n=21)	71.4%

Regions I, II, and III – Providence, Rhode Island November 3-4, 2011	Percentage Respondents Agree or Strongly Agree:
Section 6: Action Planning	
I better understand concepts related to community asset mapping and action planning as capacity building strategies. (n=23)	87.0%
I better understand concepts related to community asset mapping and action planning as capacity building strategies. (n=24)	87.5%
The Community Asset Map (Community Partner Activity) was helpful. (n=23)	87.0%
The Action Plan: Ideas for Action (Community Partner Activity) was helpful. (n=24)	91.7%
Overall	
The Collaboration Institute provided information that will be beneficial to my work. (n=23)	82.6%
I would recommend this event to other TANF/FBCO groups wanting to collaborate. (n=22)	90.9%

Comments

Which presentation/activity was most helpful and why:

Volunteer Management

- Volunteer partnership
- Volunteer presentation
 - *New information*

Table Top Discussion

- Presentation from the other states
 - *Different approaches/ideas*
 - *Ideas and contacts*
- *Helpful to hear how other states do things/provide services*
 - *This is the meat of/focus for this meeting and something we can't get in state*

Interagency Communication

- Vermont
 - *Provided new strategies and partnerships to enhance goals of TANF agencies*
- Interagency Communication
 - *Ways that we can help enhance our partners' communications and collaboration to more community partners- great to learn what other states are doing!*

Action Planning

- Asset Mapping
 - *Identify linkages*
- The action plan
 - *It helped us to focus on our needs*
- *Focused on a gap in customer service and steps to fill this vital*

- *Synthesized conference activities/resources into a concrete action steps*
- *Gave us ideas for strengthening our partnerships*
- Beach ball
 - *Challenges of community need and very engaging*
- *Fun- thought provoking*
- The Action Plan with the ball of yarn
 - *It gave a visual of strengthening and improvement*
 - *We developed a plan and made connections*

Other

- Partnership Collaborations
 - *Ideas for new collaborations/partnerships*
- Opportunity to work with my state TANF rep
 - *Not enough time to plan*
- Organizational Infrastructure-break out session, breakfast with partners
 - *Exchange of ideas by other states; open/relax discuss about what's working or not and exchange of ideas*
- Just the opportunity to focus
- Building partnerships

Which presentation/activity was least helpful and why:

The Importance of Volunteers

- The Rhode Island Serve presentation
 - *Rhode Island doesn't use this program anymore*
 - *Seemed a tad outdated and scattered*
- Doing job descriptions/position development
 - *Skill set we already have (too basic)*
 - *Basic knowledge- known*
 - *Already know how to do this*

Organizational Infrastructure

- Organizational Infrastructure
 - *With it focused more on practical advice for FBCO's- too much emphasis on job descriptions*

Action Planning

- Beach ball
 - *Too touch feely for New Englanders*

Additional Comments:

- Not well organized
- Everything was helpful
- I found them all to be helpful even as a reference course
- All were very helpful

- I found this entire meeting geared for low-level organizations, not well matched for the audience
- Please plan more time for discussion day

30-Day Follow-up Report: Providence Collaboration Institute

This report summarizes feedback from participants in New Hampshire, Vermont, and New Jersey—including both TANF officials and their community-based partners—who attended the initial TANF-FBCOs Collaboration Institute meeting in Providence, Rhode Island. ICF conducted **three sets of 60-minute calls** to determine the current status of the “action plans” developed by those who attended this Collaboration Institute, which was hosted on November 3-4, 2011. Whenever possible, steps were taken to convene both TANF leaders and their faith-based or community-based partner on the same call (although in some cases, this was not possible due to participant scheduling difficulties). A full list of those who participated in these calls is included in Figure 1. For each call, ICF gathered baseline feedback for each of the following questions:

- *Have you shared your action plan with other members of your staff?*
- *Have you discussed your action plan with other organizations?*
- *Have you met in person or convened a call with your FBCO partner? (Or for the FBCO, have you followed up with your partnering TANF agency?)*
- *What were the three leading elements of your action plan?*
- *What changes, if any, have you made vis-à-vis volunteer management? What changes do you plan to make?*
- *What changes, if any, have you made regarding inter-agency partnership or communication? What are you planning in this area?*
- *What broader changes, if any, have you made as a result of the Collaboration Institute? Are you doing anything in terms of organizational development or cross-sector outreach?*
- *Now that you've been back in your local community for a month, what additional recommendations or reflections do you have regarding the Collaboration Institute?*
- *What additional technical assistance or other supports would be helpful to you, as you and your colleagues implement these changes and new partnerships in your community?*

Action Plan Impact

While most Collaboration Institute participants said they appreciated the meeting in Providence, only one the representatives from New Jersey had extensively shared their action plan with other managers on her team. Most TANF officials and local FBCO leaders referenced that with the shortened month, Thanksgiving holiday travel and other year-end tasks they had not yet had ample opportunity to discuss and take follow-up action with their plans. Many planned to do so in December, and noted that inter-agency meetings or volunteering outreach would likely not happen until early 2012.

The representative from the Office of Faith-Based Initiatives in New Jersey was able to share the action plan with other managers on her team, however. They had not been able to discuss the action plan with other agencies, but planned to tie in elements of their plan with the upcoming TANF Request-for-Proposals process throughout the state.

Similarly, TANF officials in New Hampshire have scheduled meetings to follow up with their local Community Action Programs, and to discuss the elements of their action plan that involve managing connections between the state TANF programs and other community-based and state resources. They plan to build upon existing web-based resources in the state to strengthen “access” and help community leaders understand how to support low-income individuals with wraparound services.

In terms of expanding outreach with volunteers, Vermont’s TANF program leaders—who attended the Providence meeting with other public agencies that collaborate extensively throughout their state—have taken initial steps to perform background checks for their volunteers. New Hampshire also utilizes some volunteers in their mandatory work program but indicated that their community-based partner, Southern New Hampshire CAP, uses volunteers more frequently. Numerous participants described their appreciation for the volunteering session, and noted their plans to take part in the project’s follow-up Volunteering Webinar.

Finally, Vermont also plans to increase its collaboration between TANF programming and the state-level Department of Labor, by building on the state’s existing ability to integrate Web sites. This will mean incorporating job club meetings in a wide range of congregations and community settings, and helping those job clubs to better connect with employment-seeking Web sites and other Web-based job-seeking resources.

Final Reflections

Overall, feedback about the Collaboration Institute was positive, particularly given current economic difficulties and the challenges TANF agency officials face in meeting their work participation rates and other federally mandated requirements. One attendee suggested providing more technical support around building community resource lists. Another requested more information around social media, case management, and performance measurement. Others said they hoped the Institute could be even more focused on information around employment strategies, and asked whether follow-up support from the project could help them connect with other job-training and job placement opportunities at the local level.

A table that illustrates participation by state and organization is included below. Several participants whose schedules did not allow them to participate said via email correspondence that they would look forward to participating in the 180-day follow-up calls.

Figure 1: Providence 30-Day Follow-Up Call Participants

Participant	Title	Organization	Call Date
Janine Lesser	Program Specialist IV	New Hampshire, Division of Families, DHHS	11/28/2011
Craig Comstock	Reach Up Program Manager	Vermont Dept. of Children and Families	11/28/2011
Marie Waring	CDF III	VT Department of Labor	11/28/2011
Cynthia Fentress	Program Manager	NJ Dept of State-OFBI	12/2/2011

Appendix D: Curriculum

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**TANF FBCO
Collaboration Institute
Participant Workbook**

Disclaimer

The information and material presented and shared at this technical assistance event is provided for general information only, and understood that the US Department of Health and Human Services, Administration for Children and Families, Office of Family Assistance (OFA) and/or the ACF, OFA Regions are not providing professional, program or policy advice or recommendations on a particular matter.

The Office of Family Assistance makes every effort to ensure that the information presented and/or shared during this TA activity is accurate and updated and relevant for participating stakeholders. The Office of Family Assistance accepts or assumes no responsibility whether expressed or implied for the accuracy, currency and completeness of the information shared during this TA activity. Additionally, use of any examples provided by outside organizations should be construed as an endorsement by OFA. Therefore, before any action or decision is taken on the basis of any information received at this TA activity the user should obtain appropriate independent advice.

Section 1: TANF-FBCO Collaboration Overview

Objectives:

- Learn about the TANF Faith-FBCO Initiative's purpose and history.
- Understand Charitable Choice and its implications for TANF/FBCO Partnerships.
- Increase understanding of readiness factors and organizational capacity as defined in the Analytical Report.

TANF Faith-Based and Community Organizations (FBCO) Initiative: An Overview, 2011

The TANF Faith-Based and Community Organizations Initiative is a 4-year project that examines promising partnerships between TANF offices and FBCOs working in their communities. The goal of the initiative is to help low-income participants attain economic self-sufficiency by linking together the unique strengths of faith-based organizations, community-based groups, and intermediary organizations with TANF programs at the state and local levels. The project describes some leading practices in partnering organizations nationwide, and makes available a set of on-the-ground tools for interested TANF program leaders and FBCO communities.

There are four primary components of the Initiative:

The initiative's **first phase** (2007-08) collected information from 139 grassroots faith-based and community organizations nationwide, resulting in a [Compendium of Organizations](#), which documents core components of 139 local social service organizations. After a careful vetting process, 23 of these organizations with highly promising elements—whether because of their relationship with local TANF agencies, unique approaches to serving clients, existing public support, or evidence of effectiveness—were selected for further study.

The project's **second phase** (2008-09) consisted of a refined analysis of the top 23 FBCOs, described in the [Snapshots of Success](#) report. The research team followed up systematically with Executive Directors in each of the 23 sites, and using information gleaned from informal phone-based outreach, identified 8 sites that would participate in on-site interviews and analysis.

During the **third phase** (2009-10), the team conducted two-day site visits with each of the 8 leading FBCO partners, and developed initial [case studies](#) about FBCO programs partnering with their local TANF office. These case studies were analyzed to determine readiness factors and organizational capacities necessary to facilitate successful collaboration.

Finally, the initiative's **fourth phase** (2011-present) compiled these case studies and other relevant "tools" gathered in the field into an online webpage, for use by a larger number of FBCO leaders or TANF officials and practitioners interested in supporting local public-private partnerships in their communities. Using the analytical report that reviews leading practices from all 8 program partnerships, in 2011 the project will support a series of one-day Collaboration Institute meetings with Regional and State TANF leaders as well as their local FBCO partners, with a goal of enhancing outcomes for TANF-eligible individuals and families.

What is the "charitable choice" provision? (Section 104 of P.L. 104-193)¹

Non-governmental charities and churches have been transforming shattered lives for generations by addressing the deeper needs of people and instilling hope and values which help change behavior and attitudes. The charitable choice provision will provide greater opportunities for these organizations to help fight poverty.

Section 104 of The Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (P.L. 104-193) gives states specific options to provide welfare-related services to the poor through contracts with charitable, religious, or private organizations; and to provide beneficiaries of assistance with vouchers which are redeemable with such organizations.

In particular, Section 104 provides specific language regarding the participation of religious organizations in delivering welfare services. In the past, many faith-based organizations have not participated in government programs for fear of having to compromise their religious integrity. Also, program managers may have misapprehended constitutional law and may have wrongly excluded religious organizations from the mix of private providers for fear of violating the establishment clause of the Constitution. Some may have gone too far in regulating what religious organizations must do to receive government funds.

How does the charitable choice provision work?

Charitable choice allows-but does not require-states to contract with charitable, religious, or private organizations, or to create voucher systems, to deliver welfare services within the states. States must consider religious organizations on an equal, nondiscriminatory basis with other groups when deciding to contract with private institutions.

To what programs will charitable choice apply?

The charitable choice provision applies to funds under the Temporary Assistance for Needy Families program, which replaced AFDC, and the Supplemental Security Income program in cases where the law allows for contracts or voucher programs with the private sector. Charitable choice may also apply to certain aspects of the food stamp and Medicaid programs, if those laws allow for contracts or vouchers with the private sector.

What types of services could faith-based organizations provide under charitable choice?

The new TANF program involves more than just handing out checks. Rather, the program's work requirements and limitation on benefits are suited to the involvement of non-governmental, charitable organizations that are successful in moving people from dependence to self-reliance. Under charitable choice, states could contract or develop a voucher system with nongovernmental institutions to provide welfare services in a variety of settings.

¹ <http://peerta.acf.hhs.gov/uploadedFiles/Charitablechoice.pdf>

- **Work:** In administering the work requirements, states could involve faith-based organizations in the provision of subsidized jobs, on-the-job training, job search and job readiness assistance, community service positions, vocational educational training, job skill training, and GED programs.
- **Food:** Church/synagogue soup kitchens could provide meals or run food pantries.
- **Maternity homes:** For unmarried minor mothers and expectant mothers who cannot remain with their parents, states may want to place these minors in voluntary-sector maternity homes, adult-supervised residential care, second-chance homes, or other suitable living quarters.
- **Medical and health services:** Faith-based groups could provide abstinence education and drug counseling/treatment, or operate health clinics.

What rights do faith-based organizations have under charitable choice?

Non-discrimination: If a state chooses to involve the independent sector in providing services, it may not discriminate on account of a provider's religious character. An organization has a private civil cause of action for injunctive relief if it believes that its rights have been violated. State courts have exclusive jurisdiction over any such case.

Independence: An organization shall retain its independence from Federal, State, and local governments, including the organization's control over the definition, development, practice, and expression of its religious beliefs. The organization is not required to alter its form of internal governance. For example, a state could not require that the organization's governing board reflect the ethnic and cultural diversity of the local community. The organization also cannot be required to remove religious art, icons, scripture, or other symbols from its premises.

Employment practices: Faith-based providers may discriminate on a religious basis in the terms and conditions established for their employees. Involvement as a provider of social services does not act as a waiver of the provider's Title VII exemption. Faith-based providers are not relieved of any other non-discrimination responsibilities. State and local human rights laws and Federal civil rights laws that are triggered by the receipt of federal financial assistance are unaffected.

What rights do beneficiaries have under charitable choice?

Non-discrimination: Faith-based providers may not discriminate against a beneficiary on the basis of religion, a religious belief, or a refusal to actively participate in a religious practice. For example, a Catholic organization may not deny services to a beneficiary of a Protestant faith. A beneficiary does not have to participate in saying grace at a meal, but s/he cannot force the religious organization to refrain from having grace.

Alternative services: Any beneficiary who objects to receiving services from a faith-based organization has a right to demand that the state provide them with services from any alternative (non-religious) provider. A beneficiary has a private civil cause of action for injunctive relief if s/he believes that her/his rights have been violated. State courts have exclusive jurisdiction over any such case.

What Does it Take to have an Effective Partnership?

When considered as a whole, site visit interviews with TANF officials and FBCO leaders made clear that some key factors can help determine whether TANF agencies and FBCOs are ideally suited to build successful partnerships that result in improved outcomes for children and families.² For TANF agencies, internal indicators include, among others, the use of performance-based partnerships; agency leadership; and overall openness to community partnerships and place-based strategies - an effort to provide services within the geographic area of need. For FBCOs, readiness factors include internal organizational structure and independent financial management; outcomes-based services; staffing; and providing services that complement TANF's mission and goals. The following represents a collective list of the most important factors for consideration as identified through our interviews:

- **Common goals are important.**
- **Clear delineation between religious and social service programming.**
- **Demonstrated success along with the administrative capacity to track data and make data driven decisions.**
- **Faith-based organizations that have an established diverse network of partners, including for-profit organizations.**
- **Ongoing communication and capacity-building activities are essential.**

What Characteristics are Important to Look for in an FBCO Partner?

Specific characteristics appear to be common in the FBCO partners that have developed and maintained successful TANF partnerships. It is worth considering the existence of the characteristics or the potential to develop these characteristics before entering into a partnership.

- **Collaborative leadership**
- **Skilled Staff**
- **Structured Volunteer Management**
- **Holistic and Coordinated Service Delivery**

The analytical report: *Enhancing TANF Faith-Based and Community Partnerships, Essential Readiness Factors and Capacities of TANF Agencies and FBCOs* offers more details on these organizational characteristics and serves as the foundation for the Collaboration Institute.

² Ultimately—improved outcomes for TANF recipients means greater family self-sufficiency. But in the specific cases of different FBCO programs, this often also meant stronger job placement and retention rates, improved school performance for youth, lower arrest and incarceration rates, fewer instances of depression, sustained child support payments, and other site-specific criteria noted in the project's online case studies reports.

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Section 2: Volunteer Management

Objectives:

- Learn about different types of volunteers and tips for using volunteers to build organizational capacity.
- Understand basics of volunteer management including strategies for volunteer recruitment, placement and oversight.
- Identify capacity building resources related to volunteer management.

Why Would a TANF Agency Want to Partner with an FBCO?

Analyzing some of the unique advantages to partnership with FBCOs reveals the following as it relates to expanding capacity to meet the needs of TANF-eligible families.

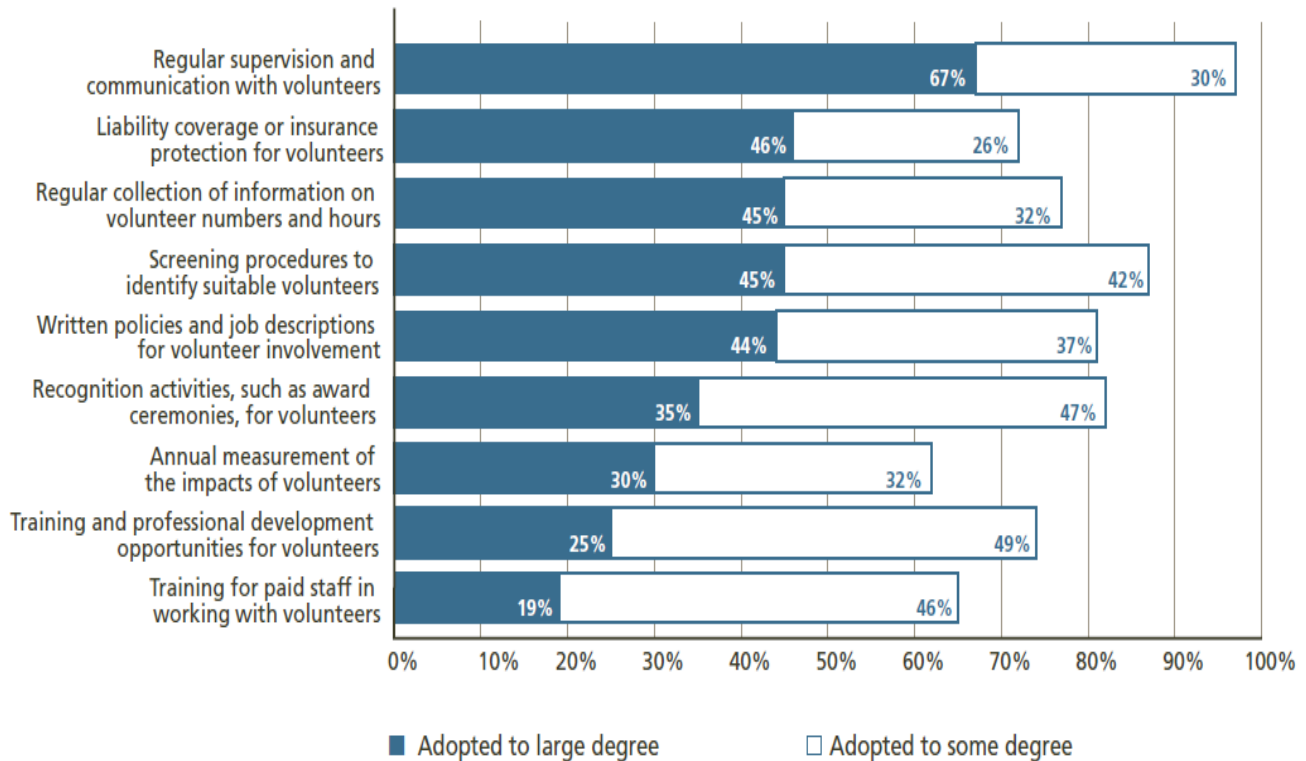
- **“Organizing capacity,” given FBCOs’ public dimension and networking access:** For decades, community-organizers have known the power of grass-roots organizations to mobilize citizens to make collective social change, including reforms in race relations, banking, education, and other policy arenas. By working with volunteers from FBCOs, TANF officials can access elements of this same broad commitment to social justice, improving community well-being, and involving recipients of public aid in the work of restoring their families and communities. Additionally, through active partnership, TANF officials have access to a venue for educating communities on regulatory changes or new services.
- **Access to volunteers:** With regular weekly gatherings for worship and other events, many congregations can quickly summon large numbers of individuals to support the needs of TANF recipients. Most of the country’s congregations (83%) take part in or support social service, community development, or neighborhood organizing projects. The vast majority of these (91%) report that congregation members volunteer to serve these programs and activities (Corporation for National and Community Service, 2009). Many of these volunteers are highly skilled, educated individuals.

What Characteristics are Important to Look for in an FBCO Partner?

Specific characteristics appear to be common in the FBCO partners that have developed and maintained successful TANF partnerships. It is worth considering the existence of the characteristics or the potential to develop these characteristics before entering into a partnership. With regard to use of volunteers, that includes a framework that supports volunteers.

Structured Volunteer Management: Successful use of volunteers requires understanding of volunteer management and the unique motivations that drive volunteers. Organizations with structured volunteer recruitment, retention, and recognition strategies are better positioned to develop a solid base of dependable volunteers. Unfortunately, even though most organizations recognize the importance of volunteer management, many do not fully invest in these practices as illustrated in **Figure 1** on the next page.

Figure 1: Management Practices that Charities Say They Practice to a Large Degree or to Some Degree



Volunteer Management Practices and Retention of Volunteers (The Urban Institute, June 2004.)

Volunteer Recruitment

Successful volunteer recruitment begins with a plan. Volunteers want to feel useful and that their efforts are making a difference. A successful volunteer experience increases the likelihood that a volunteer will want to volunteer with an organization again.

Special Events - Many volunteers enjoy helping with special events. These events can be community resource fairs, fund-raising events or feeding the homeless during the holidays.

Special Projects - Volunteers can also help with special projects like community needs assessments, community awareness projects, or process improvement projects.

Ongoing Volunteers - These volunteers are often the backbone of many non-profit organizations. Ongoing volunteers may assist with anything from administrative functions to direct service delivery.

When developing a volunteer plan, consider the duties to be assigned, how much time it may take and what qualifications a volunteer would need to perform the duties can be a first step in selecting the right volunteer for the position.

Volunteer Position Development

Use this form to think through how you might use volunteers to build capacity within your organization.

What isn't getting done now because you don't have time? _____

What idea have you wanted to implement, but not had time? _____

How many hours a week would it take someone to do it? _____

What would you call this position? _____

Who would they report to? _____

What knowledge, skills and abilities would someone need to perform this job? _____

Knowledge: _____

Skills: _____

Abilities: _____

Other special requirements: (background check, licenses, etc.) _____

Where might you look for someone like this? _____

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Where might you recruit volunteers?

As mentioned previously, volunteers often volunteer through their church or other religious organization. Typically, volunteers give time to organizations a) with a good reputation, b) support causes that they believe in and c) ask them to volunteer. There are different types of volunteers as well:

- **Community Service:** This term is often used to refer to youth who need service hours for the National Honor Society, High School, College Scholarship opportunities, Scouting Programs, etc.
- **Court-Required Community Service:** Volunteers in this category are required through an agreement with the court system to contribute time to an organization as a restitution of sorts. These volunteers may have specific requirements in terms of where they volunteer number of hours or types of activities. For example, a DUI defendant may be required to perform services in a trauma unit at a local hospital.
- **Corporate Volunteer:** Many corporations encourage employees to volunteer in the community. These volunteers are often allowed to volunteer during the traditional work-week using company time.

The attached example of a volunteer application located in the supporting materials section is used by the City of Jacksonville and can be used as a guide for developing a volunteer application.

The Corporation for National and Community Service (CNCS)

CNCS was formed to engage Americans of all ages and backgrounds in service to meet community needs. Each year, more than 1.5 million individuals help meet local needs through a wide array of service opportunities. These include projects in education, the environment, public safety, homeland security, and other critical areas through the Corporation's programs.

<http://www.nationalservice.gov>

Various programs:

- **Senior Corps:** Senior Corps offers a network of programs that tap the rich experience, skills and talents of older citizens to meet community challenges.
- **AmeriCorps:** Through its programs, AmeriCorps provides opportunities for Americans to make an ongoing, intensive commitment to service.

Resource Box

Need help with volunteer Recruitment?

HandsOn Network, the volunteer-focused arm of Points of Light Institute, is the largest volunteer network in the nation and includes more than 250 HandsOn Action Centers in 16 countries. HandsOn includes a powerful network of more than 70,000 corporate, faith and nonprofit organizations that are answering the call to serve and creating meaningful change in their communities. Annually, the network delivers approximately 30 million hours of volunteer service valued at about \$600 million.

<http://www.handsonnetwork.org>

- **AmeriCorps State and National:** AmeriCorps*State and National offers grants that support a broad range of local service programs that engage thousands of Americans in intensive service to meet critical community needs. AmeriCorps*State and National also administers grants for Indian tribes and U.S. territories, who are eligible for funding that is set aside to address critical needs within their communities.
- **AmeriCorps VISTA:** AmeriCorps*VISTA provides full-time members to community organizations and public agencies to create and expand programs that build capacity and ultimately bring low-income individuals and communities out of poverty.
- **AmeriCorps NCCC:** The AmeriCorps*National Civilian Community Corps is a full-time residential program for men and women aged 18-24 that strengthens communities while developing leaders through direct, team-based national and community service.

Funding Supports for Volunteer Efforts

In addition to volunteer programs, CNCS also offers funding opportunities to encourage citizen engagement to address community issues. Here are a few examples:

Learn and Serve America: Learn and Serve America provides grants to schools, higher education institutions and community-based organizations that engage students, their teachers and others in service to meet community needs.

Nonprofit Capacity Building Program: The Nonprofit Capacity Building Program (NCBP), a new program authorized by the Edward M. Kennedy Serve America Act, will increase the capacity of a small number of intermediary grantees to work with small and midsize nonprofits in communities facing resource hardship challenges to develop and implement performance management systems.

Social Innovation Fund: The Social Innovation Fund (SIF), an initiative enacted under the Edward M. Kennedy Serve America Act, is a new way of doing business for the federal government that stands to yield greater impact on urgent national challenges. The Social Innovation Fund targets millions in public-private funds to expand effective solutions across three issue areas: economic opportunity, healthy futures, and youth development and school support. This work will directly impact thousands of low-income families and create a catalog of proven approaches that can be replicated in communities across the country.

Volunteer Generation Fund: The Volunteer Generation Fund, a new program authorized by the Edward M. Kennedy Serve America Act, is designed to increase the number of people who serve in meaningful roles as volunteers dedicated to addressing important needs in communities across America.

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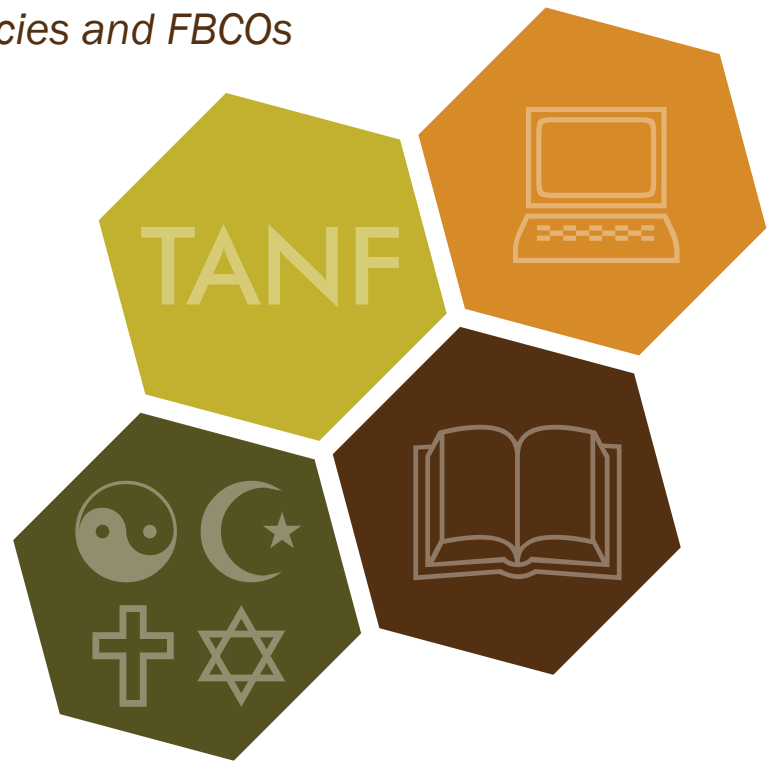
Supporting Materials

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Enhancing TANF Faith-Based and Community Partnerships

*Essential Readiness Factors and
Capacities of TANF Agencies and FBCOs*





Enhancing TANF Faith-Based and Community Partnerships

Brief Overview of Government and Faith-Based Partnerships

To illustrate some of the historical challenges and needs associated with government partnerships with faith-based social service providers, we need only to remember the Alamo. More specifically, recall the 1995 Teen Challenge Rally at the Alamo. Teen Challenge, a Christian-based drug rehabilitation program that addressed addiction through religious teaching, not traditional therapy, and was at the time being threatened with closure by the Texas Commission on Alcohol and Drug Abuse. Although the agency did not receive any government funding, as a treatment program it fell under the state of Texas' regulatory power. While Teen Challenge was in violation of a number of regulations, including using treatment staff who did not have state-required educational credentials, its leaders argued that this attempt to shut them down was an infringement on their religious freedom. In protest, they staged a rally at the Alamo—complete with hundreds of former addicts attesting that Teen Challenge had saved their lives. The Texas Governor responded to the backlash immediately, although differently than expected. His response focused on the end-goal: “If we can cure people from addiction, then we ought to cheer success and applaud it, and not short-circuit success by force-feeding a too-narrow government-approved model that robs faith-based charities of the very things that make them so uncommonly effective” (Sager, 2010). With the Alamo Rally serving as a catalyst, Texas created the first state-led Office of Faith and Community Based Initiatives, and began a mission to remove regulatory barriers and welcome faith and community based organizations (FBCOs) to the table as partners in addressing social issues.

This underlying tension between government-regulated programs and the unique approaches of faith-based social service providers reflects a larger debate, and one that has entered the national landscape anew in the last 15 years. Section 104 of the Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) passed in 1996¹, commonly known as ‘Charitable Choice,’ specifically sought to promote self-sufficiency through reduced legal and regulatory barriers to partnerships between government-funded TANF programs and FBCOs. Since the implementation of Charitable Choice, the number of contracts between states and FBCOs has increased—yet, because these partnerships are wide-ranging and local in character, there is much we are still learning about their implementation and effectiveness.

Although the debate is still evolving, the current administration continues its commitment to strengthen FBCOs by reorganizing the White House Office for Faith-Based and Neighborhood Partnerships to serve as a resource for secular and faith based nonprofits and community organizations looking for ways to make a bigger impact in their communities, learn their obligations under the law, cut through bureaucracy, and make the most of what the federal government has to offer (The White House, Office of the Press Secretary, 2009). Recent studies have shown that when FBCOs partner with TANF agencies, families can sometimes have greater success in moving toward economic self-sufficiency (Schneider, 2006)—and yet few in-depth comparisons examine outcomes for needy families who receive support from FBCOs versus those who only receive support from TANF or other public agencies. While faith-based and other grassroots community organizations have at times achieved success in supporting “hard-to-serve populations” facing multiple barriers to employment, this success is not always guaranteed. A great deal is still unclear about what makes for effective cooperation, if any, between public agencies and FBCOs (Banks, Hercik, & Lewis, 2004).

This paper is designed to deepen the conversation by identifying the key readiness factors, overall capacities, and practices of both TANF agencies and FBCOs that have led to successful partnerships in eight communities. By examining important elements of these partnerships, we hope to provide guidance to other TANF agencies and FBCOs interested in collaborating to improve outcomes for families and low-income individuals.

¹ The Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) of 1996 established the Temporary Assistance for Needy Families (TANF) program and created new requirements on state governments to move welfare recipients into work as a way of reducing welfare dependency and encouraging self-sufficiency.



Enhancing TANF Faith-Based and Community Partnerships

The TANF Faith-Based and Community Organizations Initiative: Project Overview

In 2007 the U.S. Department of Health and Human Services (HHS), Administration for Children and Families' Office of Family Assistance (OFA) developed the TANF-FBCOs Initiative to document and increase understanding of the types of partnerships that had developed between TANF and FBCOs. The study sought to catalog promising practices for potential use by other State and local TANF programs seeking innovating service delivery strategies, and by FBCOs looking for more constructive models of government partnership. As part of the study, Initiative partners compiled consistent data for 139 FBCOs that had relationships either with a local TANF agency or a One-Stop Career Center and then conducting in-depth structured discussions with a group of 23 selected organizations that demonstrated noteworthy collaborative partnerships. Subsequently, a research team conducted two-day site visits with eight FBCOs that had developed the strongest collaborations with their local TANF agency—typically formalized through a direct contract, an intermediary partnership, or an alternative Memorandum of Understanding. In selecting each organization, the project team looked carefully at available data from each site's overall performance outcomes, the economic support they provided in the community, any direct links to public agencies, and other unique characteristics including advantages from inter-faith collaboration or partnership with other grassroots organizations serving low-income individuals.

The analysis that follows is based on information collected during the individual calls and two-day site visits conducted with the following eight organizations and their TANF partners:

- **Bethel Development Corporation**, a faith-based organization linked to Bethel African Methodist Episcopal (AME) Church in Millville, NJ.
- **Faith Connections**, a publicly funded intermediary that links congregations and interdenominational faith-based organizations with TANF recipients at the Department of Social Services in Wilson County, NC.
- **Faith Partners**, a co-located program that supports needy families in El Paso, CO, through the local Department of Human Services' TANF Family Independence Unit.
- **Future Foundation**, a community-based organization providing services to disadvantaged and at-risk youth—and their families—in an underserved community in Atlanta, GA.
- **Henry Street Settlement**, a community-based intermediary organization in New York City that works closely with its local workforce and TANF agencies, and with Seedco, a national nonprofit and intermediary organization.
- **Missouri Valley Community Development Agency**, a community-based organization that serves low-income individuals and families in seven counties in rural Missouri.
- **Pathways-VA, Inc.**, an inter-faith community development corporation in Petersburg, VA that serves TANF recipients and troubled youth by supporting them in job-training and placement programs.
- **Sacramento Healthy Marriage Initiative**, a community-based organization that employs TANF recipients and serves low-income, unmarried couples in the greater Sacramento region.



Enhancing TANF Faith-Based and Community Partnerships

Why Would a TANF Agency Want to Partner with an FBCO?

David Burns, former director of the Department of Human Services in El Paso County, explained the need for TANF partnership best when he was summoned to a community gathering of faith-based charities upset over the potential impact of time limits imposed in TANF reform. Mr. Burns responded to these concerns by explaining that TANF is designed to help people financially; it was never designed to give people hope. The faith community is uniquely positioned to give hope and help people transition to self-sufficiency. Here are some of the other unique advantages to partnership:

- **Dedicated staff:** Site visits repeatedly illustrated the hardworking nature of individuals who bring an inner motivation to their work. Many view their work as a ministry, an extension of their religious responsibility to care for the less fortunate; driven by their faith they are often willing to go well beyond the traditional workplace expectations. This mission focused attitude often permeates the workplace creating a culture of service.
- **Access to volunteers:** With regular weekly gatherings for worship and other events, many congregations can quickly summon large numbers of individuals to support the needs of TANF recipients. Most of the country's congregations (83%) take part in or support social service, community development, or neighborhood organizing projects. The vast majority of these (91%) report that congregation members volunteer to serve these programs and activities (Corporation for National and Community Service, 2009)). Many of these volunteers are highly skilled, educated individuals. The eight FBCOs report a combined total of 3,340 dedicated volunteers without including those who volunteer through their partner organizations. For example, Partners in Ministry is a coalition of 44 congregations that provides volunteers in support of Faith Connections.
- **Existing relationships within the community:** Henry Street Settlement was founded on Manhattan's Lower Eastside in 1893 to serve the poor and often immigrant population. It has a rich history as a trusted resource, a huge advantage when working with low-trust populations. TANF case managers can leverage these existing relationships to assist families. For example, Faith Connections has clients sign a release of confidentiality. This release allows a pastor to communicate with a caseworker on the client's behalf. This can be particularly helpful when there are comprehension or literacy issues on the part of those seeking services. By serving as a liaison, the trusted pastor can help clients understand and follow through with what needs to be done to remain in compliance.
- **Access to nontraditional supports:** TANF caseworkers are bound by regulatory requirements that determine what services and other supports not provided by TANF they can offer clients. FBCOs can provide supplemental supports like cash assistance for incidentals, work shoes, clothing, donated bicycles, or even cars for transportation. Additionally, the volunteers form an informal support network for those who may not have family or friends to provide assistance. Volunteers through Partners in Ministry adopted a woman who was receiving TANF and got a job, but had no transportation to her night-shift position. The volunteers took turns taking and picking her up until they were able to arrange the donation of a car. One of the volunteers helped her find a house closer to her new job. When asked to comment on what makes services from FBCOs unique, many TANF recipients cite their overall appreciation for genuine, personal support, which sometimes differed from their experience at "less personal" public bureaucracies (Monsma & Soper, 2003).
- **Capacity to help forge change for high-risk individuals:** Though more rigorous studies are needed, TANF officials suggested that sometimes faith-based treatment programs were able to "spark significant change for high-risk addicts who have tried everything," and may wish to seek out unique strategies developed by groups such as Teen Challenge and Alcoholics Anonymous (Bavolek, 2003). Bethel Development Corporation receives a list of approximately 100 sanctioned individuals each month



Enhancing TANF Faith-Based and Community Partnerships

from its TANF partner. Diverse partners, dedicated volunteers, and a community-based location allow Bethel to provide a more comprehensive hands-on approach to working with clients facing multiple barriers to success.

- **Organizing capacity, given FBCOs' public dimension and networking access:** For decades, community-organizers have known the power of congregations to make collective social change, including reforms in race relations, banking, education, and other policy arenas. By working with volunteers from FBCOs, TANF officials can access elements of this same broad commitment to social justice, improving community well-being, and involving recipients of public aid in the work of restoring their families and communities. Additionally, through active partnership, TANF officials have access to a venue for educating communities on regulatory changes or new services.

What Does it Take to have an Effective Partnership?

When considered as a whole, site visit interviews with TANF officials and FBCO leaders made clear that some key factors can help determine whether TANF agencies and FBCOs are ideally suited to build successful partnerships that result in improved outcomes for children and families.² For TANF agencies, internal indicators include, among others, the use of performance-based partnerships; agency leadership; and overall openness to community partnerships and place-based strategies - an effort to provide services within the geographic area of need. For FBCOs, readiness factors include internal organizational structure and independent financial management; outcomes-based services; staffing; and providing services that complement TANF's mission and goals. The following represents a collective list of the most important factors for consideration as identified through our interviews:

- **Common goals are important.** TANF's four primary goals are: 1) assisting needy families so that children can be cared for in their own homes, 2) reducing the dependency of needy parents by promoting job preparation, work, and marriage, 3) preventing out-of-wedlock pregnancies, and 4) encouraging the formation and maintenance of two-parent families. All eight of the FBCOs provide services that directly or indirectly support two or more of TANF's goals.
- **Clear delineation between religious and social service programming** is particularly important for faith-based organizations that grow directly out of religious congregations. The creation of a separate 501(c)3 organization formalizes the distinction, and several TANF officials specifically recommended this legal "framework" for any FBCO partnerships. Equally important, faith-based leaders must understand the need for and be willing to enforce the requirement of the separation—particularly if a contractual relationship exists. A guide to the legal rules surrounding public partnerships with FBCOs can be an important support for this kind of collaboration.³ Incorporation not only helps to clearly define the separation of funding, it increases access to additional revenue streams (e.g., funding from foundations). Specific TANF/government funding streams often require FBCOs to leverage other resources in order to provide services. As a result, the impact that incorporation has on enhancing access to additional revenue sources was identified as critical by both TANF agencies and their partnering FBCOs.
- **Demonstrated success along with the administrative capacity to track data and make data driven decisions** is important regardless of the level of data management sophistication. Henry Street Settlement recognized that if they wanted to position themselves to access federal funding through performance based contracts, they needed to be administratively proficient. They use a web-based real time data management system that saves time and allows them to monitor client progress. The data

² Ultimately—improved outcomes for TANF recipients means greater family self-sufficiency. But in the specific cases of different FBCO programs, this often also meant stronger job placement and retention rates, improved school performance for youth, lower arrest and incarceration rates, fewer instances of depression, sustained child support payments, and other site-specific criteria noted in the project's online site visit reports.

³ One strong example is the set of principles issued by the White House Office of Faith-Based and Community Initiatives, available online at <http://www.ethicsinstitute.com/pdf/Faith%20Based%20Federal%20Grants.pdf>. Additionally, in November 2010 the Obama Administration released a set of principles clarifying the federal regulations for partnerships with FBCOs, available online at <http://www.whitehouse.gov/the-press-office/2010/11/17/executive-order-fundamental-principles-and-policy-making-criteria-partner>.



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are used to document outcomes as well as inform program decisions. Analyzing the data, they noticed that while employment retention rates between three and six months did not vary much, rates dipped significantly after six months. As a result, they have increased wrap-around services at the six-month point. In Petersburg, VA, Pathways developed a useful form to help track core services delivered by its local partners, and made these results readily available for the local TANF agency. Future Foundations does not use a sophisticated data management system, but tracks the progress of approximately 200 students in the after school program using an Excel spreadsheet. They monitor student grades and attendance.

- **Faith-based organizations that have an established diverse network of partners, including for-profit organizations** are better positioned to more efficiently and holistically meet the needs of TANF recipients, via additional referrals that complement their core services. Strategic partnerships with for-profit agencies can enhance the operations of public and nonprofit partnering organizations by allowing them to “think like a business” and improve overall program management. A recent study evaluating welfare-to-work programs suggested that, in multiple settings, the combination of for-profit agencies and FBCOs delivered highly positive workforce results, and TANF-affiliated partnerships are wise to consider the merits of this approach (Monsma & Soper, 2003). Henry Street Settlement, for example, has worked with United Parcel Service (UPS) for over 40 years. Through this partnership, they have created a workforce development training program and increased job opportunities for low-income community residents in New York’s Lower East Side, assisting the local TANF agency’s goal of promoting job preparation and work in order to reduce families’ dependence on government benefits.
- **Ongoing communication and capacity-building activities are essential.** In addition to ensuring that partnering TANF agencies and FBCOs possess the needed readiness factors to build successful partnerships, agency leaders noted the importance of engaging in on-going communication and capacity building activities to support and further strengthen inter-agency relationships. Specifically, leaders in both TANF agencies and FBCOs suggested that partnering organizations develop policies and procedures to facilitate cross-referrals and information sharing between programs. Programmatic communication was often cited by leaders and staff members alike as one of the most important and also challenging capacity building activities for effective partnerships. Comprehensive information sharing goes beyond data sharing at the case level to developing communication streams that update partners on new programs, changes in program eligibility, and other agency and program developments as they arise. Many of the sites indicated a desire to increase their inter-agency trainings so that staff in both agencies could regularly receive agency and program updates.

Beyond developing policies and procedures to facilitate cross-referrals and communication between agencies, outside technical assistance was also identified as an instrumental tool for helping agencies improve their service delivery and program structures so that they facilitate inter-agency collaboration. Technical assistance was often offered by an outside entity and was provided to TANF agencies and FBCOs on an individual bases; however, its impact on enhancing the capacity and strength of the TANF-FBCO partnership was recognized across organizations.

Considerations for Structuring Partnerships

- **A written agreement such as a Memorandum of Understanding (MOU)** between a TANF agency and its outside partners provides clarity of roles and responsibilities, and increases accountability for expected outcomes. While Welfare-to-Work agencies rely on nonprofits to help them effectively reach their goals, the contractual and funding oversight regulations can sometimes intimidate smaller, grassroots FBCOs. To strengthen this system and avoid confusion, TANF agencies and FBCOs need clearly understood protocols or MOUs that govern their fiduciary relationships (Hasenfeld & Powell, 2004). Standardized agreements



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across FBCO partnerships allow TANF case managers to more accurately compare the effectiveness of their partners on improving client outcomes. Examples of some of the agreements used by TANF agencies can be found on the project's online toolkit, linked via the TANF Peer TA website (www.peerta.acf.hhs.gov).

- **Co-location of services** generally strengthens collaboration between TANF agencies and FBCOs when appropriate, given the physical constraints of many local Human Services agencies housing TANF programs. In the three project sites whose offices were co-located, TANF officials described an enhanced ability to refer clients to their local FBCO partner, and TANF recipients stated that it was easier to meet with a partnering liaison during the time of their visit. When services themselves—or a referral by an in-house intermediary partner—are housed in the same facility as TANF case managers, transportation issues can be eliminated for families. In Colorado Springs, Faith Partners' staff actually participates in meetings with TANF case managers, helping to inform the referral and client follow-up process. Similarly, New York City and other communities use online, web-based TANF applications that directly integrate the TANF application process within the social service agency "network" in the surrounding area, allowing families to apply for public assistance at faith-based and community locations.⁴
- **Experienced intermediary** partners generally mitigate financial risk and provide ongoing technical assistance which can greatly benefit TANF-FBCO partnerships. The Ford Foundation affiliated group, Local Initiatives Support Corporation, brought particular strategic management guidance to Pathways, and Seedco similarly helped Henry Street Settlement administer its monthly reports to its TANF partner in New York City. Additionally, developing appropriate infrastructure and fiscal controls is necessary to ensure effective service delivery and compliance with government regulated funding. If these attributes do not already exist within the FBCO, they can often be provided through oversight of an intermediary.

What Characteristics are Important to Look for in an FBCO Partner?

Specific characteristics appear to be common in the FBCO partners that have developed and maintained successful TANF partnerships. It is worth considering the existence of the characteristics or the potential to develop these characteristics before entering into a partnership.

- **Collaborative leadership:** Across communities, respondents agreed that a clear vision, dedication, persistence, and flexibility were important qualities for an effective FBCO leader to possess when partnering with TANF agencies. Successful leaders were able to develop and articulate a vision that clearly identified their organization's mission and how inter-agency collaboration facilitated its achievement. Two specific leadership characteristics were identified as critical in effectively addressing resistance to change, a common challenge for both TANF agencies and FBCOs. First, TANF agency leaders greatly impacted the extent to which their staff valued and incorporated inter-agency collaboration into their daily work. Secondly, TANF agency representatives generally identified the FBCO executive director as their primary contact within the partnering organization, noting that this specific relationship between the leaders often served as the basis for the partnership that existed between the two agencies.

It should be noted that the majority of FBCOs visited continue to be operated by their founding executive directors. While leaders agreed that this is not necessary for partnering, the continuity of leadership often resulted in deep, long-term TANF-FBCO partnerships in the communities where it did exist. A cautionary tale here is important as partnerships built solely on leadership relationships could be at risk when leadership changes. For example Henry Street Settlement's Executive Director retired this year after 7 years as director and an overall 38 year career with the organization. Without succession planning and an integrated culture of partnership that included relationships on multiple levels, program continuity could have been put at risk.

⁴Two excellent examples include the ACCESS Florida program and New York City's TANF and workforce application procedures.



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- **Skilled Staff:** Staffing capacity within FBCOs was another important readiness factor often cited by TANF agency representatives. Capacity was not simply defined in terms of numbers but also the capability of FBCO staff to provide clients with the needed support services they required and communicate the provision of these services back to TANF case workers. FBCO staff need to possess appropriate job skills in addition to their passion to serve families. Internal policies and procedures can also assist staff with consistent performance.
- **Structured Volunteer Management:** Successful use of volunteers requires understanding of volunteer management and the unique motivations that drive volunteers. Organizations with structured volunteer recruitment, retention, and recognition strategies are better positioned to develop a solid base of dependable volunteers. As an example of an organization that has successfully embedded the support of volunteers across all of its service delivery programs, Pathways asks volunteers “to do something with us, not something for us.” Pathways designed its programs so that community volunteers work alongside TANF program participants, developing the relational component helping volunteers feel more connected to the participants instead of the work. This has resulted in long-term commitments from volunteers and support from outside community members, and greatly expanded Pathways’ capacity for providing comprehensive services to TANF recipients.
- **Holistic and Coordinated Service Delivery:** Individuals and families seeking the services of TANF agencies often experience multiple, complex barriers to attaining employment and self-sufficiency. With recent upticks in TANF caseloads due to the national economic recession (2008-10), the ability of FBCOs to provide holistic services was identified by TANF case workers as perhaps the most important readiness factor for distressed communities. While some FBCOs were able to provide a diverse array of services to meet the multiple needs of TANF recipients through programs within their organizations, the majority of FBCOs relied on an expansive network of partners to meet the needs of their clients. FBCOs that were able to make referrals and provide coordinated case management, offering TANF case workers a single point of contact for updated case information, provided the ideal partner for TANF agencies.

Faith Connections provides a strong example of the value of comprehensive and coordinated service delivery models. As a publicly funded intermediary, Faith Connections links congregations, nonprofit organizations, businesses, and individuals in a coordinated manner to meet the needs of TANF recipients that cannot otherwise be met through government programming. Faith Connections informs its partnering entities about the specific needs of TANF recipients, and responses are coordinated through a DSS staff member who runs this loose consortium of faith-based partners. Through this collaborative model, partnering entities can feel secure that their services are going to individuals who are truly in need, while simultaneously filling a gap in service delivery that is not currently being met through government programming. This structure also provides TANF case managers with a single point of contact through which they can attain supplemental resources to help their clients attain self-sufficiency. Given that these partner organizations are community-based, it is also a good example of placed-based strategies, discussed next.

Place-Based Strategies and Collective Impact: Relevant Frameworks for Grounding and Moving the TANF-FBCO Initiative Forward

All eight of the TANF-FBCO partnerships analyzed in this paper represent collaborative efforts to create a network of services that are easily accessible to TANF families and work collectively to move those families toward self-sufficiency. Research suggests there are two concepts at play here that maximize the potential for positive outcomes: *place-based strategies* and *collective impact*:



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What are place-based strategies?

The concept of *place-based strategies* is not new in the faith community. The local house of worship, a central focus of the faith community for generations has regularly drawn people together as a community to participate in religious activities, social events, and church athletic leagues or receive child care, counseling, support groups, or food pantry services. A recent University of Pennsylvania survey examined 1,392 religious congregations in Philadelphia, showing that the vast majority provided social services from within the city limits (Cnaan, Boddie, McGrew, & Kang, 2006).

Place-based strategies targeting community needs in a specific geographic area by focusing resources to leverage investments and draw upon the strengths of local cooperative agreements have recently become increasingly recognized as valuable to low-income communities throughout the country.⁵ Place-based strategies address dual challenges within distressed communities: lack of individual resources and lack of community resources (Crane, & Manville, 2008).

Place-based strategies combine social planning, community organizing, community development, and policy advocacy to generate change within low-income communities. Policy surrounding place-based programming relies primarily on three key elements:

- use of “local knowledge”;
- investing in community capacity;
- recognizing the strength and resources of local government and community leaders (Crane, & Manville, 2008).

These key elements reflect the value added of place-based policies over broad federal mandates.

Building and leveraging local leadership and organizational capacity enables programs and partnerships to efficiently address the needs of populations already known to grassroots program leaders. Consider Bethel Development Corporation; their outreach started with a soup kitchen and as they became aware of other services needed, they worked to expand their capacity to meet these needs. Henry Street Settlement offers everything from job training to afterschool programming to English as a second language to emergency financial assistance. Having co-located services such as those offered by Bethel and Henry Street in a familiar environment increases the likelihood that families will access the available services as needed. Additionally, the opportunity to effectively coordinate access to multiple issue-specific services, contributes to positive outcomes associated with the concept of collective impact.

What is collective impact?

In considering outcomes of TANF programs, researchers, practitioners, and policy-makers often focus on numbers served through job training, work placements, employment retention rates, etc. Unfortunately, for many TANF families, the path from growing up in poverty to becoming self-sufficient is not a straight line. TANF- FBCO partnerships offer an opportunity to look more broadly at traditional outcomes and how they are achieved; the partnerships leverage the collective impact of partnering agencies on individuals, families, and communities. For example, individuals served through Faith Connections receive the usual job training and placement opportunities, but in looking at the case of the woman we highlighted earlier, we cannot definitively say what made the difference in her overall success of transitioning to self-sufficiency. Was it the job training, the donated car, the housing near her job, or the support network of volunteers cheering her on as they provided transportation? Faith Connections’ Partners in Ministry served 1,087 clients, provided 27 donated automobiles to individuals in need, offered financial assistance in varying increments totaling \$37,405, and supplied transportation, mentors, and other nontraditional supports through volunteer efforts. While each activity in

⁵ See http://www.whitehouse.gov/sites/default/files/omb/assets/memoranda_fy2009/m09-28.pdf for more on current place-based strategy policy.



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and of itself generates an outcome, collectively they create the necessary framework for families to address the multiple barriers preventing self-sufficiency.

In a commentary on collective impact and the necessity of broad cross-sector coordination to effect large-scale social change Kania and Kramer (2011) note:

Substantially greater progress could be made in alleviating many of our most serious and complex social problems if nonprofits, governments, businesses, and the public were brought together around a common agenda to create collective impact. (p. 4)

According to Kania and Kramer (2011), five important conditions can lead to significant social change:

- First, a common agenda wherein all participants have a vision for change is required. The authors highlight the pivotal role funders play in leading collaborators to develop “a common understanding of the problem and a joint approach to solving it through agreed upon actions.”
- Second, despite the seemingly monumental task of developing a data system that measures common metrics across diverse technological and organizational systems, the authors note that a common agenda is “illusory” until a shared measurement is developed. Advances in web technology have eased this burden enormously in recent years by increasing access to web-based data management systems.
- Third, because social problems which originate from multiple causes cannot be addressed through uncoordinated actions of isolated organizations, the authors assert that stakeholders’ activities should be orchestrated into a single overarching plan in order to create the greatest amount of impact. They refer to this concept as “mutually reinforcing activities.”
- Fourth, daunting though it may seem to carry out, change strategies which have had the greatest impact have continuous, frequent communication on a monthly or bi-weekly basis (and sometimes continuing for years) to develop trust, a similar language, and appreciation of the common motivations underlying each other’s efforts.
- Fifth, noting that coordination takes time, the authors suggest that dedicated staff (separate from the participating organizations) should be responsible for planning, managing, and supporting the initiative “through ongoing facilitation, technology and communications support, data collection and reporting, and handling the myriad logistical and administrative details.” Interestingly, they note that the belief that collaboration can occur without a support structure is one of the biggest causes of failure.

Linking these Frameworks to TANF-FBCO Partnerships

As TANF reform has taken effect, there has been a shift toward the strategic coordination of comprehensive services (collective impact) directed to one specific location or community (place-based strategies) in order to increase the number and quality of positive outcomes for the people living in the targeted community. In a study of low-income women leaving TANF, Harris and Parisi (2008) illustrate how opportunities, place, and poverty are intricately linked. Noting that “one-dimensional revitalization strategies [can often] have limited impact,” Pastor and Turner (2010) suggest that communities which implement place-based strategies also often experience a number of interconnected problems such as joblessness, crime, social isolation, failing schools, poor public services, and disinvestment. The authors go on to conclude that policy makers, researchers, and advocates can help direct the focus and scope of place-based strategies through rigorous evaluation and creative planning.



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Models that have developed from this shift include the Annie E. Casey Foundation's Making Connections programs, Harlem Children's Zone, and the recently created Promise Neighborhood program from the U.S. Department of Education, which has funded more than 21 initiatives throughout the country since the passage of the nation's Recovery Act in 2009.

- **The Annie E. Casey Foundation's Making Connections** is a long-term, multi-site effort that has clearly demonstrated how poor outcomes for children and families in tough neighborhoods can be changed for the better. The foundation targeted 22 communities to attempt to move families living in these communities towards increased earnings, permanent assets, educational success, civic participation, networks of support, and overall health and supportive services. The three premises behind this 10-year funding initiative are: (1) creating the opportunity to earn a decent living and build assets; (2) building close ties with family, neighbors, kin, faith communities, and civic groups; and (3) having reliable services close to home. In the program's Denver site, over 300 families have opened savings accounts since the introduction of a local office of Denver Community Federal Credit Union, 89 percent of pre-K through 3rd grade children at the local middle school now have health insurance coverage, and 732 children have gained access to preschool. These results are not atypical and can be found across program sites. (The Annie E. Casey Foundation, n.d.a.; and n.d.b.).
- **Harlem Children's Zone (HCZ)** is another increasingly visible place-based model developed for the Harlem neighborhood in New York City, focusing "on the social, healthy and educational development of children." This initiative was designed to be a neighborhood-based, at-scale approach to fighting child poverty, and is supported by a wide range of public and private entities in New York City and across the United States. The model's core principles are: (1) serving an entire neighborhood to scale; (2) creating a pipeline of support; (3) building community among residents, institutions, and stakeholders to create the necessary environment for children's healthy development; (4) evaluating outcomes to inform decision making; and (5) cultivating a culture of success rooted in passion, accountability, leadership, and teamwork. By developing programs in line with these principles, in 2009, HCZ served over 21,000 individuals within a 97 block area in New York and emerged as a leader in the development of place-based collaboration (Harvard Family Research Project, 2005).
- Inspired by HCZ's successes, in 2010, the Department of Education announced the first round of 21 **Promise Neighborhood Planning grantees**. The purpose of this program is to help targeted communities dramatically improve outcomes and opportunities for children and families, at scale, in local neighborhoods. Over time, the initiative is designed to prepare young children for school, to promote academic success including high school and college graduation, and to help families attain greater well-being in terms of their children's physical, emotional, and academic health. The program emphasizes capitalizing on local knowledge, breaking down silos, utilizing existing multi-partner collaborations, and prioritizing rigorous evaluation plans that can better inform similar initiatives. Since many FBCOs operate with a similar mentality—partnering across institutional lines to collectively serve geographic areas of a community, their approach to providing wraparound supports for TANF recipients and other low-income individuals dovetails nicely with the underlying goals of Promise Neighborhoods (Jean-Louis, Farrow, Schorr, & Bell, 2010; and U.S. Department of Education, n.d.).

Conclusion

In short, the unique approaches of FBCOs should be welcomed—and carefully assessed—by TANF providers who serve a common audience. Many FBCOs are employing certain elements of place-based approaches to serving their communities, and many are achieving results that help promote economic self-sufficiency. The recognition of key readiness factors, organizational capacity concerns, and a strong need for ongoing communication are themes echoed throughout the literature and the TANF-FBCO partnerships.



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Higher national rates of unemployment in 2009 and 2010 have motivated many TANF program leaders implementing federally funded programs to re-strategize—and broaden—their service delivery systems. One way to reach beyond traditional clients and find creative means to support clients holistically is to partner with FBCOs that are deeply committed to serving the same populations. This paper summarizes some of their innovative strategies, as well as initially promising approaches to partnership.

As TANF agencies and FBCOs consider deepening existing relationships, or forging new partnerships, some of the strategies outlined in this paper can help strengthen supportive services for low-income families and communities. Both contemporary research on collaboration and recent discussions with TANF officials and FBCO leaders in the field provide a shared framework for promoting greater self-sufficiency for low-income families. One key difference in place-based strategies and the TANF-FBCO partnerships assessed in this Initiative is that place-based strategies draw on community organizing and policy advocacy activities to help a community become self-sufficient. In the past, TANF-FBCO partnerships have not tended to take this additional step.

Beginning in the early 1990s, the U.S. government renewed a focused on the power of place-based policies when working to address domestic policy problems. More recently, in 2009, the Obama administration released an inter-agency memorandum, outlining a renewed focus on place-based strategies which included an emphasis on evaluation (Orszag, Barnes, Carrion, & Summers, 2009). This memorandum was meant to direct the FY2011 budget, and has led the way for the development of a framework to allow government agencies to cultivate place-based strategies.

This could suggest an opportunity to direct the focus and scope of emerging collaborations by enhancing the use of local knowledge from community organizers or others, in addressing gaps in individual and community resources. The experiences outlined in this paper suggest that the TANF and FBCO communities have a great deal in common, and have much to gain from collaborating in a shared cause.



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TANF FAITH-BASED AND COMMUNITY ORGANIZATIONS INITIATIVE





City of Jacksonville
Office of Volunteer Services



Volunteer Application

Name: _____
(First) (MI) (Last)

Street: _____ Home Phone: _____

City: _____ State: _____ Zip: _____

E-Mail: _____ Work Phone: _____ Ext: _____

Pager: _____ Cell Phone: _____

School / Employer: _____

Birthdate (dd/mm/yr) A Parental permission form is required for volunteers under age 18.

Education:

High School/Equivalent: No Yes School: _____

College Degree: No Yes College: _____

Major: _____

Driver's License: No Yes

Please check any activities you have experience in:

<input type="checkbox"/> Accounting/Bookkeeping	<input type="checkbox"/> Environmental	<input type="checkbox"/> Public Relations
<input type="checkbox"/> Administrative	<input type="checkbox"/> Information Technology	<input type="checkbox"/> Special Events
<input type="checkbox"/> Advisory Board	<input type="checkbox"/> Library Services	<input type="checkbox"/> Senior Activities
<input type="checkbox"/> Animal Care	<input type="checkbox"/> Mailings/Envelope Stuffing	<input type="checkbox"/> Other: _____
<input type="checkbox"/> Children's Activities	<input type="checkbox"/> Office Assistant	<input type="checkbox"/> Other: _____
<input type="checkbox"/> Customer Service	<input type="checkbox"/> Professional	

Please check each of the following as they apply to you:

Computer Skills:		Communication Skills:	
<input type="checkbox"/> Data Entry	<input type="checkbox"/> Desktop Publishing	<input type="checkbox"/> Ability to read	<input type="checkbox"/> Effective Writing
<input type="checkbox"/> Internet	<input type="checkbox"/> Word Processing	<input type="checkbox"/> Ability to write	<input type="checkbox"/> Customer Service
<input type="checkbox"/> Spreadsheets		<input type="checkbox"/> Public Speaking	

Days and Number of Hours You Are Available to Volunteer

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Morning							
Afternoon							
Evening							

Date Available to Start:

If you are a current volunteer, please indicate:
Assignment: _____ Approx. Date Started: _____

How did you find out about us?

- Word of mouth Booth Flyer Presentation
 Website Newspaper Magazine TV

Example

Personal References:

List two persons not related to you who have definite knowledge of your qualifications.

(1) Name: _____ Address: _____
 Telephone: _____ City/State/Zip: _____
 Occupation: _____

(2) Name: _____ Address: _____
 Telephone: _____ City/State/Zip: _____
 Occupation: _____

Previous Volunteer or Work Experience:

Name of Organization	_____	Contact Name	_____	Phone Number:	_____
Location:	_____	From (Date)	_____	To (Date)	_____

Name of Organization	_____	Contact Name	_____	Phone Number:	_____
Location:	_____	From (Date)	_____	To (Date)	_____

Have you ever pleaded "nolo contendere" to or been convicted or found guilty of a first degree misdemeanor or a felony?

No Yes

If yes, please give date, nature of offense and disposition.

A criminal record will not necessarily bar an applicant. A criminal record will be considered as it relates to specifics of the position for which you have applied

In case of an emergency please contact:

Name:	_____	Home Phone:	_____
Relationship:	_____	Street Address:	_____
Work Phone:	_____	City/State/Zip:	_____

Are there any medical problems or issues of which we should be aware in the event of an emergency? If so, please list them below:

I verify that all information given in this application is true to the best of my ability. I authorize contact of listed references. I understand that misrepresentation or omission of facts requested is cause for non-appointment as a City of Jacksonville volunteer or for termination after appointment.

Signature _____ Printed Name _____ Date _____

Revised 1/24/05

Section 3: Organizational Infrastructure (*Break-out Session*)

Objectives:

- Increase awareness of the importance of appropriate organizational infrastructure including having defined roles and responsibilities, written job descriptions and written policies related to administrative oversight.
- Recognize importance of administrative capacity to track data and use data to inform program decisions and measure outcomes.
- Understand the importance of creating a collaborative culture that actively seeks and nurtures partnerships including dedicated staff, strategic internal policies and consideration of co-locating services.

What Does it Take to have an Effective Partnership?

For TANF agencies, internal indicators include, among others, the use of performance-based partnerships; agency leadership; and overall openness to community partnerships and place-based strategies - an effort to provide services within the geographic area of need.

For FBCOs, readiness factors include internal organizational structure and independent financial management; outcomes-based services; staffing; and providing services that complement TANF's mission and goals. The following represents a collective list of the most important factors for consideration as identified through our interviews:

- **Common goals are important.** TANF's four primary goals are: 1) assisting needy families so that children can be cared for in their own homes, 2) reducing the dependency of needy parents by promoting job preparation, work, and marriage, 3) preventing out-of-wedlock pregnancies, and 4) encouraging the formation and maintenance of two-parent families.
- **Clear delineation between religious and social service programming** is particularly important for faith-based organizations that grow directly out of religious congregations. The creation of a separate 501(c)3 organization formalizes the distinction, and several TANF officials specifically recommended this legal "framework" for any FBCO partnerships. Equally important, faith-based leaders must understand the need for and be willing to enforce the requirement of the separation—particularly if a contractual relationship exists. A guide to the legal rules surrounding public partnerships with FBCOs can be an important support for this kind of collaboration.³ Incorporation not only helps to clearly define the separation of funding, it increases access to additional revenue streams (e.g., funding from foundations). Specific TANF/government funding streams often require FBCOs to leverage other resources in order to provide services. As a result, the impact that incorporation has on enhancing access to additional revenue sources was identified as critical by both TANF agencies and their partnering FBCOs.

³ One strong example is the set of principles issued by the White House Office of Faith-Based and Community Initiatives, available online at <http://www.ethicsinstitute.com/pdf/Faith%20Based%20Federal%20Grants.pdf>. Additionally, in November 2010 the Obama Administration released a set of principles clarifying the federal regulations for partnerships with FBCOs, available online at <http://www.whitehouse.gov/the-press-office/2010/11/17/executive-order-fundamental-principles-and-policy-making-criteria-partner>.

- **Demonstrated success along with the administrative capacity to track data and make data driven decisions** is important regardless of the level of data management sophistication. Henry Street Settlement recognized that if they wanted to position themselves to access federal funding through performance based contracts, they needed to be administratively proficient. They use a web-based real time data management system that saves time and allows them to monitor client progress. The data are used to document outcomes as well as inform program decisions. Analyzing the data, they noticed that while employment retention rates between three and six months did not vary much, rates dipped significantly after six months. As a result, they have increased wrap-around services at the six-month point. An example Data Tool is included in the *Supporting Materials* tab.
- **Faith-based and community organizations that have an established diverse network of partners, including for-profit organizations** are better positioned to more efficiently and holistically meet the needs of TANF recipients, via additional referrals that complement their core services. Strategic partnerships with for-profit agencies can enhance the operations of public and nonprofit partnering organizations by allowing them to “think like a business” and improve overall program management. A recent study evaluating welfare-to-work programs suggested the combination of for-profit agencies and FBCOs can deliver highly positive workforce results, and TANF-affiliated partnerships are wise to consider the merits of this approach (Monsma & Soper, 2003).
- **Collaborative leadership is vital.** Across communities, respondents agreed that a clear vision, dedication, persistence, and flexibility were important qualities for an effective FBCO leader to possess when partnering with TANF agencies. Successful leaders were able to develop and articulate a vision that clearly identified their organization’s mission and how inter-agency collaboration facilitated its achievement.

Two specific leadership characteristics were identified as critical in effectively addressing resistance to change, a common challenge for both TANF agencies and FBCOs. First, TANF agency leaders greatly impacted the extent to which their staff valued and incorporated inter-agency collaboration into their daily work. Secondly, TANF agency representatives generally identified the FBCO executive director as their primary contact within the partnering organization, noting that this specific relationship between the leaders often served as the basis for the partnership that existed between the two agencies.

Resource Box

Staff Screening Toolkit

The *Staff Screening Tool Kit (Third Edition)* was developed by the Nonprofit Risk Management Center and is provided by the Corporation for National and Community Service to assist you in the selection and placement of your volunteers and staff. The primary goal of proper staff screening is to select the right person for the position that you want to fill. The tool kit discusses specific actions you should take, as well as issues you need to consider, before selecting an individual to serve in your organization.

<http://www.nationalservice.org/sources.org/staff-screening>

- **Staffing capacity** within FBCOs was another important readiness factor often cited by TANF agency representatives. Capacity was not simply defined in terms of numbers but also the

capability of FBCO staff to provide clients with the needed support services they required and communicate the provision of these services back to TANF case workers. FBCO staff need to possess appropriate job skills in addition to their passion to serve families. Internal policies and procedures can also assist staff with consistent performance. A sample Standard Operating Procedure is included in the *Supporting Materials* section.

- **Holistic and coordinated service delivery** is important in meeting the needs of individuals and families seeking the services of TANF agencies. Often, TANF recipients experience multiple, complex barriers to attaining employment and self-sufficiency. With recent upticks in TANF caseloads due to the national economic recession (2008-10), the ability of FBCOs to provide holistic services was identified by TANF case workers as perhaps the most important readiness factor for distressed communities. While some FBCOs were able to provide a diverse array of services to meet the multiple needs of TANF recipients through programs within their organizations, the majority of FBCOs relied on an expansive network of partners to meet the needs of their clients. FBCOs that were able to make referrals and provide coordinated case management, offering TANF case workers a single point of contact for updated case information, provided the ideal partner for TANF agencies.
- **Co-location of services** generally strengthens collaboration between TANF agencies and FBCOs when appropriate, given the physical constraints of many local Human Services agencies housing TANF programs. In the three project sites whose offices were co-located, TANF officials described an enhanced ability to refer clients to their local FBCO partner, and TANF recipients stated that it was easier to meet with a partnering liaison during the time of their visit. When services themselves—or a referral by an in-house intermediary partner—are housed in the same facility as TANF case managers, transportation issues can be eliminated for families. In Colorado Springs, Faith Partners’ staff actually participates in meetings with TANF case managers, helping to inform the referral and client follow-up process. Similarly, New York City and other communities use online, web-based TANF applications that directly integrate the TANF application process within the social service agency “network” in the surrounding area, allowing families to apply for public assistance at faith-based and community locations.⁴
- **Experienced intermediary** partners generally mitigate financial risk and provide ongoing technical assistance which can greatly benefit TANF-FBCO partnerships. The Ford Foundation affiliated group, Local Initiatives Support Corporation, brought particular strategic management guidance to Pathways, and Seedco similarly helped Henry Street Settlement administer its monthly reports to its TANF partner in New York City. Additionally, developing appropriate infrastructure and fiscal controls is necessary to ensure effective service delivery and compliance with government regulated funding. If these attributes do not already exist within the FBCO, they can often be provided through oversight of an intermediary. The chart in the *Supporting Materials* tab illustrates examples of innovative intermediary partnerships.

Note: Recognizing that funding is often an issue with regards to organizational capacity for FBCOs, *Typical Funding Sources: Advantages/Disadvantages of Each* is provided in the *Supporting Materials* section.

⁴ Two excellent examples include the ACCESS Florida program and New York City’s TANF and workforce application procedures.

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Developing a Staffing Plan

Program Manager and Administrative Assistant are two of the most common positions within a program. Using the framework below, think through what one of these positions might look like within your organization.

Position Title: _____

Duties Assigned: _____

Education/Training/Experience Required: _____

Proposed Salary: _____

Total Cost of Position: _____

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FBCO Breakout Session

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Non-Profit Organizational Self-Assessment

Agency Name: _____ Date: _____

This assessment tool is designed to assist non-profit organizations in determining current organizational capacities.

Directions:

Review the categories below; reading each statement and marking an "x" in the appropriate column.

At the end of each category, total the number of "x"s in each column. Transfer that number to the corresponding section on the last page.

I. Board Governance	Yes	No	N/A
1. Agency has a charter and/or bylaws which clearly define the agency's purpose and organization and the duties, authority and responsibilities of the governing body.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Governing authority is held by a volunteer Board of Directors of at least six members, who are representative of both the community at large and the population served.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Board meetings are held at least once per calendar quarter or in accordance with agency bylaws. Minutes are recorded and maintained in agency files.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. No nepotism exists between board and staff or with the board.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. The annual budget and any deviations from the annual budget are approved by the Board of Directors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. No voting board members are employed by the organization unless such employment is provided for in the agency's charter or articles of incorporation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Board members receive regular reports from staff on the status of each principal agency program and activity. <i>(Staff reports are included in the board minutes or attached to the minutes as a handout.)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. The bylaws state that the agency does not support partisan organizations, politicians or candidates for political office through public funds.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Board has a written policy code which addresses potential conflicts of interest.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Board members have received formal training regarding duties and responsibilities of board members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. The Board has developed and approved policies and procedures related to agency operations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Board Governance Total			
II. Human Resources Administration	Yes	No	N/A
12. Time sheets for employees or staff are signed by Immediate Supervisor, Executive Director or Program Administrator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Agency has formal job descriptions/ specifications and pay schedules on file.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Agency has personnel policies and procedures in place.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Agency has a formal personnel performance review system that is thorough and equitable.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. All personnel working with children or vulnerable populations are screened according to State or comparable guidelines.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Human Resources Administration Total			

III. Volunteer Management	Yes	No	N/A
17. Agency uses volunteers to enhance organizational capacity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Agency recruits volunteers through: A. AmeriCorps B. Retired Senior Volunteer Program (RSVP) C. College Interns	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
19. Agency has written volunteer job descriptions on file.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Agency has written volunteer policy including selection criteria, retention expectations and recognition opportunities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer Management Total			
IV. Audits And Records	Yes	No	N/A
21. An audit was performed in the last 12 months: a. The recommendations/findings noted in the compliance report, internal control report, management letter and any corrective action reports have been followed or otherwise cleared. If not, explain discrepancies in notes. b. Is the IRS Form 990 available (Tax Return for Non Profits)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
22. The agency maintains the basic books of accounting. a. General ledger b. Subsidiary ledger (accounts receivable, accounts payable) c. Cash receipt journal d. Cash disbursement journal	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
23. The provider maintains an agency operating budget detailed by cost center, by source of funds and by expenditure category. If not or a different method is used, explain in notes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Agency's annual operating budget is balanced.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. Agency maintains a record of fundraising expenses, which demonstrates that such expenses are justified in terms of fundraising results.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. Agency strives to diversify revenue sources and maximize in-kind resources.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27. The proportion of financial resources expended on administrative support is less than 25%.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Audits And Records Total			
V. Purchasing	Yes	No	N/A
28. Agency has purchasing policies and procedures, which, at a minimum, prohibit agency purchase of any service or product from an employee or any company in which an employee has a financial interest or could gain from personally, unless approved by the board.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
VI. Retention Of Records	Yes	No	N/A
29. If applicable, a policy is in place for record retention requirements as stated in the contract.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

VII. Insurance	Yes	No	N/A
30. All insurance policies are current.			
a.) Workers compensation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b.) Commercial General Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c.) Commercial Auto Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d.) Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e.) Professional Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f.) Molestation Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g.) Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Insurance Totals			
VIII. Transportation	Yes	No	N/A
31. Agency provides or coordinates transportation for clients, if needed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
a. Agency has a written plan for providing transportation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Which of the following are included in Agency's transportation policies and procedures?			
a. Escort requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Duties of driver and escort	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Charges (if any) for the transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Driving record review and minimum acceptable standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transportation Totals			
IX. Equipment And Physical Facilities	Yes	No	N/A
32. Agency's facilities are safe, well maintained and physically accessible to the consumers served.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
33. Agency's facilities and services are accessible to people with disabilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34. Physical facilities and equipment are sufficient in quantity and quality for their intended purposes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Equipment and Physical Facilities Totals			

X. Legal Concerns	Yes	No	N/A
35. Agency has adopted a written policy prohibiting discrimination on the basis of race, religion, sex, nationality, or military status in the following practices and functions:			
a. Hiring, assignment, training, promotion and termination of staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Selection of board members, and	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Provision of services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
36. Agency is fully licensed/certified/ accredited by appropriate authorities and/or accrediting bodies.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
37. Agency has established policies and records management procedures to assure client privacy.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
38. Agency has a grievance procedure which applicants for and recipients of services may use to present grievances to the agency's governing authority.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
39. Agency is registered/incorporated as a nonprofit organization under the laws of their state.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
40. Agency possesses a letter of exemption from federal taxes under Section 501 (c) (3), Internal Revenue Code.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal Concerns Total			

Total Scores based on Organizational Self-assessment

	Yes	No	N/A
I. Board Governance			
II. Human Resources Administration			
III. Volunteer Management			
IV. Audits And Records			
V. Purchasing			
VI. Retention Of Records			
VII. Insurance			
VIII. Transportation			
IX. Equipment and Physical Facilities			
X. Legal Concerns			
Total Score			

TANF Agency Breakout Session

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Collaboration Assessment

This assessment tool is designed to assess the readiness factors of a TANF Agency seeking to collaborate with Faith and Community Based Partners.

Please mark the response that best describes your thoughts for each statement. Then total your points to determine your readiness score.

	(4 points) Agree	(3 Points) Somewhat Agree	(0 Points) Don't Know	(2 Points) Somewhat Disagree	(1 Point) Disagree
TANF Agency Director:					
Possesses strong relationship-building skills					
Is open to the idea of change as it relates to process improvement					
Is able to communicate an organizational vision					
Inspires trust and commitment from others					
Is results-driven and able to set attainable goals and achieve them					
Is willing to share responsibility for organizational success					
Has primary responsibility for community relationship development					
Organizational Culture:					
Fosters open communication among staff members					
Encourages new ideas and new approaches					
Offers effective means for confronting issues/problems					
Encourages ongoing strategic planning that is not crisis-driven					
Understands the value of working with faith and community based partners.					

	(4 points) Agree	(3 Points) Somewhat Agree	(0 Points) Don't Know	(2 Points) Somewhat Disagree	(1 Point) Disagree
Develops sufficient staffing capacity to support new collaborative ventures					

Community Partnership Activities:

Are an important part of our current strategic plan					
Reflect our understanding of common goals					
Are seen as an integral component for advancing our organization's mission					
Include participation in issue-specific forums					
Include written agreements or MOUs					
Include pursuit of grant-funding opportunities with community partners					
Include sharing organizational resources with partners, such as space, staff, and programs					

Total Score in each:

--	--	--	--	--	--

Total Readiness Score: _____

Ideas for Action—Organizational Infrastructure

You will see an *Ideas for Action* page in each section of your workbook. Use this page to capture ideas related to each section that you want to explore for possible implementation. Capture all of the ideas you want to remember; you will have a chance to be more specific when you get to the *Action Planning Session*.

Place a check beside the ideas you want to be sure make it to your action plan.

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Supporting Materials

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The Data Tool

The Ring Report is New York City's primary tool for using data to monitor and improve TANF participation rates. The three steps used to design the Ring Report show how policy goals and priorities can be incorporated into measures of performance.

Step 1: Identifying Performance Indicators. In developing the Ring Report, officials in New York City focused on indicators that would capture two aspects of Job Center performance: (1) their ability to achieve the *outcome* important to the agency (that is, an increased participation rate), and (2) their ability to carry out the *processes* that may affect recipient engagement and participation.

Exhibit 1. Indicators in the Ring Report

Outcome Indicators:

- Participation rate of current TANF recipients
- Participation rate of former TANF recipients receiving assistance through New York State's Safety Net program (funded with TANF MOE dollars)
- Participation rate for other Safety Net program recipients who are not eligible for TANF (non-TANF assistance)
- Combined participation rate for current and former TANF recipients (TANF and TANF MOE); equivalent to the federal participation rate requirement
- Monthly change in the combined participation rate (TANF and TANF MOE)

Process Indicators:

- Percent of recipients in the sanction process for five weeks or fewer
- Percent of recipients in the engagement process who were engaged within a month
- Fair hearing affirmation rate on employment issues
- Fair hearing win rate on employment issues

Qualifying Process Indicators:

- Application timeliness rates for public assistance and food stamps (90 percent of public assistance and food stamp applications must be completed within the required 30-day limit for TANF and 45-day limit for Safety Net)

- **Outcome Indicators.** The outcome indicators in the Ring Report consist of five measures of the participation rate (see [Exhibit 1](#)). New York City measures this rate for each Job Center for three public assistance populations. A fourth measure indicates the combined rate for the populations funded by TANF and TANF maintenance-of-effort (MOE) dollars, which is the official rate for federal reporting purposes. Finally a fifth measure indicates the monthly change in the participation rate to recognize Job Centers that have low, but improving, participation rates.
- **Process Indicators.** The Ring Report tracks several Job Center processes: engaging TANF recipients in work or work-related activities, the sanction process, and the fair hearing process (see [Exhibit 1](#)). These indicators were identified by a group of senior staff of the Family Income Administration (FIA) in New York City's Human Resources Administration (HRA). The group

examined the status and activities of nonparticipating TANF recipients and found that more than half either were sanctioned or in the sanction process, and about 20 percent were in the initial intake and engagement process. New York City developed indicators to monitor the percent of recipients who complete both the sanction and the engagement process in a timely manner. Timeliness of the sanction process is measured by the percent of recipients who complete the process in the maximum amount of time expected. The other process indicators, which relate to monitoring the fair hearing process, are intended to encourage case managers to make appropriate decisions when assigning recipients to work-related activities.

- **Qualifying Process Indicators.** These indicators are the rates at which Job Center teams process applications for public assistance and food stamps. Although the Ring Report monitors the performance of all Job Center teams, teams must meet a 90 percent rate to be eligible for the Ring Report prize.

Step 2: Measuring Performance Relative to Agency Goals. The Ring Report compares Job Center performance on each indicator to agency targets established by FIA senior staff. This approach ensures that Job Center staff know the expected level of performance and can gauge their success in achieving agency targets. In addition to each target, FIA established a lower threshold based on a minimum or required level of performance and an upper threshold, or goal for agencies to try to reach, that represents "top performance." For example, the FIA commissioner set an agency-wide target of a 60 percent participation rate. The Ring Report specifies a lower threshold of 50 percent to identify Job Centers performing below the FIA target but above the federally required rate, and an upper threshold of 70 percent to identify Job Centers that meet or exceed agency goals.

Job Center performance is measured as the relative distance between the lower and upper threshold for each indicator. A Job Center performing at or below the lower threshold is achieving 0 percent of the agency goal, and a Job Center performing at or above the upper threshold is achieving 100 percent of the goal. Other values are converted to a percentage based on their relative distance between the lower and upper thresholds. For example, a Job Center with a 60 percent TANF participation rate is halfway between the lower threshold of 50 percent and the upper threshold of 70 percent, thus achieving 50 percent of the TANF participation rate goal of 70 percent.

Step 3: Calculating an Index Score. The index score is designed to represent overall Job Center performance and is on a scale of 0 to 100. Senior FIA staff weighted each indicator by assigning a point value to the indicator based on its relative importance to agency goals. For example, the engagement process indicator is worth 14 points, and the fair hearing win rate indicator is worth 5 points. Job Centers earn points toward each indicator based on their performance relative to agency goals — a Job Center achieving 50 percent of the agency goal receives 50 percent of the total point value for that indicator. The points earned for each indicator are added together to calculate an overall point value or index score. The outcome indicators (participation rates) represent 60 of the 100 total points, and the process indicators make up the other 40 points ([Exhibit 2](#)). While participation in the Safety Net program has the largest individual indicator point value (20 points), the multiple indicators for the TANF and MOE participation rates total 40 points. (The Safety Net program provides cash assistance to single adults, childless couples, and families with children who have reached the end of their 60-month TANF time limit.)

Exhibit 2. Thresholds, Point Values, and Sample Index Score of Ring Report Indicators

Indicator	Actual Thresholds and Point Values			Sample Rates and Points Earned		
	Lower Threshold	Upper Threshold	Point Value	Team Rate	Percent of Goal	Points Earned
Outcome Indicators						
TANF Participation Rate	50%	70%	8	50%	50%	4
MOE Participation Rate	50%	70%	8	50%	0%	0
Safety Net Participation Rate	90%	95%	20	50%	0%	0
TANF & MOE Participation Rate	50%	70%	14	50%	25%	3.5
Change in TANF & MOE Participation Rate	1%	3%	10	2%	50%	5
Total Points for Outcome Indicators	–	–	60	–	–	12.5
Process Indicators						
Percent of Cases in Engagement Process for one Month or Less	90%	95%	14	91%	20%	2.8
Percent of Cases in Sanction Process for Five Weeks or Fewer	95%	97%	13	99%	100%	13
Fair Hearing Affirmation Rate on Employment Issues	70%	95%	8	80%	40%	3.2
Fair Hearing Win Rate on Employment Issues	70%	95%	5	85%	60%	3
Total Points for Process Indicators	–	–	40	–	–	22
Total Index Score			100			34.5

<http://aspe.hhs.gov/hsp/08/TANFWPR/2/index.shtml#The> Using Data to Monitor and Improve the Work Participation of TANF Recipients: Examples from New York City and Utah December 2008, By: Jeffrey Max and Gretchen Kirby Mathematica Policy Research *This practice brief profiles two strategies, one state-wide and one local, for analyzing, reporting, and using data to hold case managers and administrators accountable for increasing the work participation of Temporary Assistance for Needy Families (TANF) recipients. We selected strategies in which data is used to keep staff informed about progress toward participation rate goals and allow program managers to address nonparticipation quickly. New York City developed a special report that tracks the participation rate and the administrative processes that affect the rate for each TANF office; senior staff met regularly with program administrators to review and discuss the report. Utah developed automated tools that case managers and supervisors can use to monitor the participation of individual TANF recipients and to report participation rates for regions, offices, and individual case managers. The data management strategy used in each site represents one element of a broader effort by each site to improve work participation rates.*

**Network for Strengthening Families
POLICIES AND PROCEDURES MANUAL**

Section:	Family Supports	Policy #: 6	
Subject:	Gift Card Distribution		
Effective Date:	May 17, 2007	Review Date:	May 10, 2007
Approved:	May 17, 2007		

POLICY: Defining gift card distribution to ensure compliance with appropriate guidelines and fiscal accountability.

PROCEDURE: Gift Card Distribution

Purpose of Cards:

Gift cards may be distributed under the following circumstances by the Social Service Coordinator:

- Character Coach for Children’s Program
- Completion of requested surveys: 21 Day, 6 months and 1 year

Process for Requesting and Issuing Cards:

1. Complete the following fields on a **Gift Card Request Form** and submit it electronically to the Executive Administrator. (See attached Form)
 - a. Name of Participant (Last name, First)
 - b. Reason for card. (Character Coach, 21 Day, 6 months and 1 year survey)
 - c. Amount requested (\$50, \$15 or \$20)
2. Completed forms are due by close of business each Wednesday allowing for distribution by Friday of the same week.
3. Upon receipt of request, Executive Administrator will:
 - a. Print request form.
 - b. Assign card number in the system and write assigned number on request form.
 - c. Provide assigned cards.
 - d. Present form to Social Services Coordinator for signature accepting cards.
 - e. Provide a copy of signed form to Social Services Coordinator.
4. Social Services coordinator will then mail cards to designated participant.
5. They should also notate the file **Status Form** with the date they mailed the card. (see attached)

Example

Jacksonville Children’s Commission
 Network for Strengthening Families
 Request for Gift Cards

	Name of Participant	Reason	\$ Amount	Card Number
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				

Request submitted by:		Date:	
Card # Assigned by:		Date:	
Cards Received by:		Date:	

- Requests for cards are to be submitted electronically by close of business each Wednesday.

Example

Family Status Form

Participant Name: John Q. Citizen ID#: 0482

Workshop Location: JCC Date: April 4 & 6, 2007

Facilitator: _____ Graduation Date: May 17, 2007 Attended: Yes No

Forms Checklist:

X	Registration	X	Family Planning Tool		
X	Family Information	X	21 Day Follow-up	Date Mailed:	Graduation
X	Pre Test		6 month Check-up	Date Mailed:	
X	Post Test		Annual Reunion	Date Mailed:	

Follow Up:

Contact Made By:	Date:	Comments:
Michelle Hughes	May 17, 2007	\$15 Gift Card provided

Agency Referrals:

Agency Referred to:	Issue/Service:	Date of Agency Contact:

Other Comments:

Example

Table 1: Innovative Intermediary Examples

Name and Type (Location)	Funding Source (Year)	Level of Funding (% Sub-granted)	Focus/Purpose of Funding	Duration and Geographic Scope of Funding	# of FBCO Partners/ Sub-grantees
OneStar Foundation – State Faith-Based and Community Initiatives Office (Texas)	Compassion Capital Fund – U.S. Department of Health and Human Services (HHS) (2005)	\$1.1 million (46%)	Capacity building	17 months (4 counties)	General training: 337 FBCOs Intensive technical assistance (TA) and sub-grants: 25 FBCOs
Governor's Office for Faith-Based and Community Initiatives (GOFBCI) (Ohio)	Compassion Capital Fund – HHS (2004) TANF Surplus Funds (via waiver received from Administration for Children and Families/HHS – Block Grant Funds) (2005)	\$750,000 (33%) \$22 million (18D)	Capacity building Service delivery (Ex-offenders and families, vulnerable youth, marriage strengthening)	2 years (statewide) 2 years (statewide)	General training 500 FBCOs Intensive TA and sub-grants: 28 FBCOs General training: 1,500 FBCOs Intensive TA and sub-grants: 22 projects (most composed of 2 or more FBCOs)
Latino Coalition for Faith and Community Initiatives (National)	Compassion Capital Fund – HHS (2005)	\$978,000 (40%)	Capacity building (for FBCOs serving at-risk Latino youths)	17 months (26 cities in 5 States)	38 FBCOs
Northern Virginia, Workforce Investment Board (Virginia)	U.S. Department of Labor (DOL) – High-Risk Youth Employment Initiative (2004)	\$10 million (70%)	Recruitment, training, and job placement/continuing education for at-risk youth (including 40% adjudicated youth)	3 years (14 cities in 4 States)	20 FBCOs
Onida County Workforce Investment Board (New York)	DOL – Touching Lives and Communities (2005)	\$481,500 (68%)	Form FBCO partnerships to expand job training and placement services to hard-to-reach populations	2 years (county)	15 FBCOs
Pima County Workforce Investment Board (Arizona)	DOL – Touching Lives and Communities (2005)	\$499,973 (54%)	Form FBCO partnerships to expand job training and placement services to hard-to-reach populations	2 years (county)	6 FBCOs
Baylor University – private, faith-based university (Texas)	DOL – Touching Lives and Communities (2005)	\$450,000 (50%)	Form FBCO partnerships to expand job training and placement services to hard-to-reach populations	2 years (county)	10 FBCOs
Center for Neighborhood Enterprise – Violence-Free Zone (VEZ) Initiative (National)	U.S. Department of Justice – Office on Violence Against Women – Rural Grant Program (2006–2007) Private Foundations Public School Systems Police Departments Corporate Foundations	\$3 million (79%) \$7.0 million per year (85%)	Capacity building, service delivery, form partnerships to expand service delivery to hard-to-reach populations, partner with FBCOs, schools, and local systems to reduce domestic violence Partner with FBCOs and local school systems to work with at-risk youth and reduce violence in schools	15 months (40 cities in 21 States) Since 1991 (8 cities in 8 States)	39 FBCOs 9 FBCOs

Typical Funding Sources: Advantages/Disadvantages of Each

Source: Ellen M. Hatfield of the Twin Cities in Minnesota

Source	Advantages	Disadvantages
Individuals	<ul style="list-style-type: none"> • Largest source of giving • Ongoing source one can build • Once a giver, also an advocate • Volunteers are a good source of money 	<ul style="list-style-type: none"> • Costly to develop, small return per individual unit • Hard to generate unless broad-based direct service appeal • Risky for the inexperienced • Need significant assistance from the organization's board and volunteers
Large-Family Foundations	<ul style="list-style-type: none"> • Source of large sums of money • Accessible, professional staff • Clear guidelines, process • Most likely to research your request • Board volunteers can help, not always key 	<ul style="list-style-type: none"> • Start-up funds only • Lengthy process • More difficult to access through personal influence • Proposals may be more lengthy
Community Foundations	<ul style="list-style-type: none"> • Much like large-family foundations • Staff may be sufficient 	<ul style="list-style-type: none"> • Host of foundations within foundations • Most money is earmarked, special funds
Small-Family Foundations	<ul style="list-style-type: none"> • May fund ongoing operating expenses • Personal influence with board members helps • Guidelines often broad • Not very fussy about grant format 	<ul style="list-style-type: none"> • Hard to access, no professional staff • Often not large sums of money • Without personal influence, may not be possible
Large Corporations / Corporate Foundations	<ul style="list-style-type: none"> • Can be source of large sums of money • Smaller amounts of money may be ongoing • Often accessible, professional staff • May be tied to volunteer involvement • Business strategy may be clear • Source of cause-related marketing 	<ul style="list-style-type: none"> • Large sums of money aren't ongoing • Hard to get around staff • Must be within their guidelines • Not likely to contribute if not headquartered locally or have a public consumer base • Often want board representation

Small Corporations	<ul style="list-style-type: none"> • Very informal approach • Money may be ongoing • Personal connections will suffice • Neighborhood focus will help 	<ul style="list-style-type: none"> • Small amounts of money • Narrow range of interest • Personal contacts are key
Federated Funds (United Ways, United Arts, Combined Health Appeal)	<ul style="list-style-type: none"> • Steady source of relatively large sums of money • Clear process • Professional staff, can be agency staff driven 	<ul style="list-style-type: none"> • Generally can't be a start-up organization • Must be social service and fit priority focus • Very lengthy entry process • Very time consuming as must be part of yearly fund raising process, with periodic in-depth review
Government	<ul style="list-style-type: none"> • Large sums of money possible • Process is set, clear • Political clout helps • May be source of ongoing money 	<ul style="list-style-type: none"> • Application procedures may be long, tedious • May only pay by unit of service, fluctuates • Unspent monies may be returned • Difficult record keeping
Churches and Organizations	<ul style="list-style-type: none"> • Often looking for group projects 	<ul style="list-style-type: none"> • In-kind services most likely • Need to fit their service focus, neighborhood or religious outlook

Section 4: Table Topic Discussion

Objectives:

- Engage participants in dialogue based on the previous presentations as preparation for the *Action Planning* session

The following discussion questions are offered to generate ideas. Each table will be asked to report out.

What are some of the common goals between TANF Agencies and the Faith-based and Community Organizations (FBCO)?

How can we leverage the existing relationships FBCOs have in the community to promote services or raise awareness related to TANF programs?

What are some strategies to enhance administrative capacity related to data management?

What are some ideas for better utilizing volunteers to strengthen our partnership and serve TANF eligible families?

In completing the Assessment Tool, what areas were identified as strengths? Weaknesses? Were there any surprises?

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Ideas for Action—Table Topic

You will see an *Ideas for Action* page in each section of your workbook. Use this page to capture ideas related to each section that you want to explore for possible implementation. Capture all of the ideas you want to remember; you will have a chance to be more specific when you get to the *Action Planning Session*.

Place a check the ideas you want to be sure make it to your action plan.

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Section 5: Interagency Communication

Objectives:

- Learn strategies for initiating and maintaining win-win collaborative partnerships.
- Understand the distinctions and appropriate uses of Partnership Agreements, Memorandum of Understanding (MOU) and Performance Based Contracts.
- Learn strategies for overcoming communication barriers and developing inter-agency communication protocols.

Ongoing communication and capacity-building activities are essential.

In addition to ensuring that partnering TANF agencies and FBCOs possess the needed readiness factors to build successful partnerships, agency leaders noted the importance of engaging in on-going communication and capacity building activities to support and further strengthen inter-agency relationships. Specifically, leaders in both TANF agencies and FBCOs suggested that partnering organizations develop policies and procedures to facilitate cross-referrals and information sharing between programs. Programmatic communication was often cited by leaders and staff members alike as one of the most important and also challenging capacity building activities for effective partnerships. Comprehensive information sharing goes beyond data sharing at the case level to developing communication streams that update partners on new programs, changes in program eligibility, and other agency and program developments as they arise. Many of the sites indicated a desire to increase their inter-agency trainings so that staff in both agencies could regularly receive agency and program updates.

Beyond developing policies and procedures to facilitate cross-referrals and communication between agencies, outside technical assistance was also identified as an instrumental tool for helping agencies improve their service delivery and program structures so that they facilitate inter-agency collaboration. Technical assistance was often offered by an outside entity and was provided to TANF agencies and FBCOs on an individual bases; however, its impact on enhancing the capacity and strength of the TANF-FBCO partnership was recognized across organizations.

Considerations for Structuring Partnerships

- **A written agreement such as a Memorandum of Understanding (MOU)** between a TANF agency and its outside partners provides clarity of roles and responsibilities, and increases accountability for expected outcomes. While Welfare-to-Work agencies rely on nonprofits to help them effectively reach their goals, the contractual and funding oversight regulations can sometimes intimidate smaller, grassroots FBCOs. To strengthen this system and avoid confusion, TANF agencies and FBCOs need clearly understood protocols or MOUs that govern their fiduciary relationships (Hasenfeld & Powell, 2004). Standardized agreements across FBCO partnerships allow TANF case managers to more accurately compare the effectiveness of their partners on improving client outcomes.

- **Co-location of services** generally strengthens collaboration between TANF agencies and FBCOs when appropriate, given the physical constraints of many local Human Services agencies housing TANF programs. In the three project sites whose offices were co-located, TANF officials described an enhanced ability to refer clients to their local FBCO partner, and TANF recipients stated that it was easier to meet with a partnering liaison during the time of their visit. When services themselves—or a referral by an in-house intermediary partner—are housed in the same facility as TANF case managers, transportation issues can be eliminated for families.
- **Experienced intermediary** partners generally mitigate financial risk and provide ongoing technical assistance which can greatly benefit TANF-FBCO partnerships. The Ford Foundation affiliated group, Local Initiatives Support Corporation, brought particular strategic management guidance to Pathways, and Seedco similarly helped Henry Street Settlement administer its monthly reports to its TANF partner in New York City.

Additionally, developing appropriate infrastructure and fiscal controls is necessary to ensure effective service delivery and compliance with government regulated funding. If these attributes do not already exist within the FBCO, they can often be provided through oversight of an intermediary.

Partnership Agreement Activity

Using this template, work with your TANF Office or FBCO partner to develop a draft Partnership Agreement identifying specifically what each might bring to a partnership. This will serve as a framework for your Action Plan.

State TANF Representative: _____

Faith or Community Based Organization: _____

Purpose of Partnership: _____

Roles and Responsibilities: _____

TANF: _____

FBCO: _____

Term of Partnership: _____

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Ideas for Action—Interagency Communication

You will see an *Ideas for Action* page in each section of your workbook. Use this page to capture ideas related to each section that you want to explore for possible implementation. Capture all of the ideas you want to remember; you will have a chance to be more specific when you get to the *Action Planning Session*.

Place a check beside the ideas you want to be sure make it to your action plan.

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Supporting Materials

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Petersburg Department of Social Services

MEMORANDUM OF UNDERSTANDING

Between

The City of Petersburg Department of Social Services

and

Pathways-VA, Inc.

The following Memorandum of Understanding (the Agreement) is entered into by and between the Petersburg Department of Social Services' Petersburg Family Stabilization Initiative (hereinafter referred to as The Petersburg Department of Social Services) and Pathways-VA, Inc.

I. Purpose

The purpose of this Memorandum of Understanding (the Agreement) is to establish a working arrangement between the Petersburg Department of Social Services' Family Stabilization Initiative and Pathways-VA, Inc. to provide services to families enrolled in the Petersburg Family Stabilization Initiative.

II. Background

The Petersburg Department of Social Services has been awarded a \$250,000 grant from the Virginia Department of Social Services, targeting fifty families in the Blandford, Robert E. Lee and Pin Oaks neighborhoods to provide a comprehensive system of care.

This initiative will be referred to as The Petersburg Family Stabilization Initiative. The specific source of funding is Health and Human Services, Children's Bureau, Administration for Children and Families, Title IV-B Subpart 2 Promoting Safe and Stable Families, Catalog of Federal Domestic Assistance (CFDA) #93.556. The City of Petersburg is providing a 15.5% cash local match of \$38,750.

The approach will develop strategies aimed at wrapping comprehensive services around each family focusing on six key elements, each with measurable outcomes, supporting goals, and strategies to address each area. The comprehensive strategy will address: 1) Financial Stability, 2) School Performance, 3) Health and Wellness Status, 4) Youth and Independent Living Skills, 5) Male Involvement, and 6) Volunteerism in the Community.

III. Petersburg Department of Social Services Roles

- a) Cooperation with Pathways-VA, Inc. staff
- b) Provide required documentation
- c) Provide needed information on clients as allowable, based on release of information documents signed by client.
- d) Supplies for group projects

Example

IV. Pathways-VA, Inc. Roles

Pathways-VA, Inc. has a host of tools, expertise and services oriented toward job training, independent living skills and restoration of rights. Pathways-VA, Inc. will:

- a) Provide job readiness training and volunteer opportunities
- b) Assistance with independent living skills
- c) Help with restoration of rights

V. Period of Agreement

This agreement shall become effective on October 1, 2009 and terminate on May 31, 2010. The agreement is renewable upon written agreement of both parties for an additional one year based on funding of The Petersburg Family Stabilization Initiative.

This agreement may be terminated without reason by either party with sixty (60) days advance written notice.

VI. Execution

Either party may initiate a request to amend this Agreement by sending written notice, mailed first class, postage prepaid, to the following addresses.

For Petersburg Department of Social Services
 Kimberley D. Willis, Director
 For Pathways-VA, Inc.

Unless a shorter period is agreed to, amendments must be submitted at least thirty (30) working days in advance of their proposed effective date.

The non-initiating party shall respond to the amendment request within thirty (30) working days of its receipt. Amendments must be approved in writing by both parties and executed by persons authorized to bind the respective parties.

IN WITNESS WHEREOF, the parties have caused this Agreement to be duly executed intending to be bound thereby.

By: _____
 Kimberley Willis, Director
 Petersburg Department of Social Services
 Date: _____

By: _____
 Dwala Ferrell, Executive Director
 Pathways-VA, Inc.
 Date: _____

I.

Example

Memorandum of Agreement

Between

{Principal}

And

{Cooperative Partner}

Prisoner Reentry Initiative: A Prison Reentry, Community and Faith Initiative

I. The Parties

The parties to this Memorandum of Agreement (MOA) are:

- _____ and
- _____.

II. Term of this Agreement

This agreement is effective between 06/10/08 and 03/31/09, with a grant amount of \$9,000.

III. Description of the Project

{Principal}'s Faith and Community Model is a reentry initiative focused on assisting people leaving prison and reintegrating into their communities. The program has three primary components: mentoring, case management, and employment. This initiative is intended to positively affect the lives of its participants, their families, and their communities. For more detail, see Attachment A: Program Description.

IV. Scope and Purpose of this Memorandum

The purpose of this memorandum is to outline:

- The roles and responsibilities of {Principal} and {Cooperative Partner} in connection with the funding and operation of this project during the period specified above. Specifically, this MOA will delineate the role of {Principal} and the role of {Cooperative Partner} in relation to {Principal}'s Faith and Community Model.
- How a \$9,000 grant from {Principal} will be disbursed to, used by, and accounted for by {Cooperative Partner}.

V. Roles and Responsibilities of the {Principal}

1. Operational Responsibilities

- {Principal} is the lead agency responsible to its funder (U.S. Department of Labor, Employment and Training Agency) for the Prisoner Reentry Initiative funding stream. As such, {Principal} will implement its program in accordance with its contract with the U.S. Department of Labor, ETA.
- {Principal} will provide guidelines to assist {Cooperative Partner} with determining criteria for mentor selections and the mentoring component. {Principal} will provide mentor screening, training, and matching services for {Cooperative Partner}'s recruited mentors. {Principal} will coordinate with {Cooperative Partner}'s Mentor Coordinator to facilitate these services.
- {Principal} will hire and place one full time Reentry Counselor with {Cooperative Partner}, who will work with {Cooperative Partner} to enroll and engage 35-40 participants at all times. The Reentry Counselor will ensure each participant has a reentry plan; regular case management and case staffing; referrals to connecting services, critical to successful reentry; and job training and placement provided by the {Principal}.
- {Principal} will facilitate at least one group celebration event each year for all mentors and participants.
- {Principal} will work cooperatively with {Cooperative Partner} and meet at least quarterly with the Senior Pastor, Executive Director, or other delegate appointed to review progress and at least monthly with the Program Coordinator to discuss, review, and plan program progress.

Example

- {Principal} will work with {Cooperative Partner} to provide monitoring and technical assistance aimed at planning for {Cooperative Partner}'s service delivery for those returning from prison.
- {Principal} will provide office equipment and furniture set-up for {Cooperative Partner}'s {Principal} office, including a desk, computer, fax, phone, and computer, and will cover the costs of the {Principal} phone calls/faxes each month.

VI. Roles and Responsibilities of {Cooperative Partner}

2. Operational Responsibilities

- {Cooperative Partner} will develop and implement the mentoring component for the Faith and Community Model. The mentoring component includes recruitment and retention of mentors, ensuring all mentors' completion of screening, interviewing, training, and match components; engagement in consistent mentoring activity; and maintenance/submission of mentor documentation. {Cooperative Partner} is responsible for meeting the goals outlined in the work plan in Attachment B. Activities performed by {Cooperative Partner} will be at their own expense unless outlined within this MOA.
- {Cooperative Partner} is responsible for recruiting and ensuring that at least 10 qualified mentors are actively involved in the program for the full agreement period. Active involvement entails 4-8 hours per month of face-to-face positive interactions with participants. A qualified mentor is a mature, caring adult committed to devoting focused, quality, and consistent time to the participant, with the goal of helping the participant become a responsible adult member of the community. Mentors shall not have been convicted of any sex crime. The mentor should view his/her role as developing a trusting relationship with the participant, as well as being a change agent for the participant.
- {Cooperative Partner} will ensure the Reentry Counselor has private working space, with access to phone lines and will provide utilities.
- {Cooperative Partner}'s Senior Pastor, Executive Director, or senior leadership delegate will regularly participate on {Principal}'s Faith and Community Advisory Board twice per year (September 18, 2008 at 10:00AM and January 22, 2009 at 10:00am both at {Principal}'s address)). The advisory body will be composed of the faith, community, business community, corrections, and community-based leaders and will meet twice yearly with {Principal} leadership to offer guidance and resources for this model.
- {Cooperative Partner} will work cooperatively with the {Principal} Faith and Community program staff. {Cooperative Partner} will participate in at least quarterly review sessions and provide monthly mentoring progress updates with mentor and client sign-in logs (see Attachment C).
- {Cooperative Partner} agrees to participate in project special events, including but not limited to participant graduations, mentor training, and media events.
- {Cooperative Partner} will make available other supportive services offered to community residents available to participants.
- As part of this initiative, {Cooperative Partner} will not select participants by faith beliefs, require participation in religious events, or include religious activities in the mentoring program.

3. Reporting and Research Responsibilities

- {Cooperative Partner} will provide {Principal} with all required program activity forms on the first day of each month.

VII. Payment and Monitoring

{Principal} will reimburse {Cooperative Partner} a total of \$9,000 for expenditures incurred as outlined in Attachment B: {Principal} – {Cooperative Partner} Budget. All such payments are subject to prior payments by the U.S. Department of Labor. {Principal} must be invoiced by {Cooperative Partner} monthly or quarterly for all payments. {Cooperative Partner} will utilize this funding to provide for the expenses as outlined in Attachment B.

{Principal} staff will schedule quarterly monitoring and technical assistance sessions with {Cooperative Partner}. These sessions will be used by the {Principal} to monitor the service delivery for this grant and to document areas of growth, issues of service delivery, and outcomes associated with this project. {Principal} will also document any areas that require technical assistance, which will be determined either through {Cooperative Partner}'s self assessment or {Principal}'s assessment via the monitoring visit and monthly reports. Within one month of the quarterly visits, {Principal} will submit documentation of the visit to {Cooperative Partner}, including project

Example

status, areas of project compliance or lack thereof, and identified areas for technical assistance, with {Principal}'s follow-up plan.

In order for the {Principal} to reimburse {Cooperative Partner} in a timely manner, {Cooperative Partner} must submit monthly reports and invoices to the {Principal} . Monthly reports will document program enrollment, client activity, and client outcomes. Invoices will document spending. Payment will be approved upon the completion and documentation of bi-weekly mentoring meetings, with a listing of mentors and mentees in attendance and an overview of session topics, as well as approved invoices showing expenditures consistent with Attachment B:

Upon execution of contract:	10 mentors, bi-weekly mentoring for the period of March 9, 2008 – June 9, 2008: \$2,700
June 11 – September 30, 2008:	10 mentors, bi-weekly mentoring: \$2,100
October 1 – December 31, 2008:	10 mentors, bi-weekly mentoring: \$2,100
January 1 – March 31, 2009:	10 mentors, bi-weekly mentoring: \$2,100

{Principal} will disburse quarterly installments, provided that quarterly financial reports and monthly reports indicated have been received. The first payment will be compensation for an execution of the current contract and all previous work related to the contract prior to execution, as well as 10 active mentors participating in mentoring bi-weekly with documentation.

VIII. Disputes and Termination

- {Principal} and {Cooperative Partner} agree to contact each other immediately on the occurrence of any serious problem or if concern, cause, or convenience affecting the continuance of the initiative or the partnership emerges during the term of this MOA, particularly any problem that would result in either party not meeting their responsibilities, as outlined in Sections V and VI of this agreement.
- {Principal} and {Cooperative Partner} agree that key initiative representatives will meet as quickly as is practical and reasonable to attempt to resolve any such concern or problem.
- In the event that either {Principal} or {Cooperative Partner} concludes that the problem or concern, cause, or convenience cannot be resolved and that the initiative's operation or the relationship between {Principal} and {Cooperative Partner} cannot continue that party will give a 30-day notification to the other in writing that it intends to terminate the MOA. At the time of termination, {Cooperative Partner} must provide an accounting of all project-related expenditures and return to {Principal} any unused U.S.D.O.L. funds.
- In any case where U.S.D.O.L. federal funding is rescinded, discontinued, or otherwise withdrawn from the {Principal}, the contract will become null and void, immediately upon notification.
- All attempts will be made to resolve concern, cause, or convenience issues that may arise and affect the continuance of this contract. This Contract shall be construed under and governed by the laws of The Commonwealth of Illinois.

IX. Notices

All notices concerning this MOA will be presented in writing by either party to the other, addressed as follows:

To {Principal} :	To {Cooperative Partner}:
{Name}	{Name}
<i>President/CEO</i>	<i>Senior Pastor</i>
{Principal}	{Cooperative Partner}
{Address}	{Address}

X. Indemnity

{Principal} and {Cooperative Partner} agree to hold each other harmless from any claims, damages, loss, and expense arising out of or resulting from their subcontractors' or employees' performance under this MOA.

Example

XI. Other Requirements

No person shall on the grounds of race, color, religion, national origin, gender, disability, or age be excluded from participation in, denied the benefits of, subjected to discrimination under, or denied employment in connection with this program. All contracts awarded by the grantee or sub grantee will comply with all Federal statutes relating to nondiscrimination.

All contracts will comply with all applicable requirements of all other Federal laws, executive orders, regulations and policies governing this program. The following Federal contract provisions apply to this Memorandum of Agreement:

Nondiscrimination and Equal Opportunity Requirements - Equal Employment Opportunity, 29 CFR Part 37, All contracts shall contain a provision requiring compliance with E.O. 11246, "Equal Employment Opportunity," as amended by E.O. 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and as supplemented by regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."

Debarment and Suspension; Drug Free Workplace - Debarment and Suspension, 29 CFR Part 98 (E.O.'s 12549 and 12689)--No contract shall be made to parties listed on the General Services Administration's List of Parties Excluded from Federal Procurement or Nonprocurement Programs in accordance with E.O.'s 12549 and 12689, "Debarment and Suspension." This list contains the names of parties debarred, suspended, or otherwise excluded by agencies, and contractors declared ineligible under statutory or regulatory authority other than E.O. 12549. Contractors with awards that exceed the small purchase threshold shall provide the required certification regarding its exclusion status and that of its principal employees.

Compliance with WIA - contracts shall contain provisions requiring compliance with the Workforce Investment Act, its implementing regulations, and State WIA policies including those pertaining to reporting.

Clean Air Act (42 U.S.C. Sec. 7401 et seq.) and the Federal Water Pollution Control Act (33 U.S.C. Sec. 1251 et seq.), as amended.

Byrd Anti-Lobbying Amendment (31 U.S.C. Sec. 1352) - Contractors who apply or bid for an award of \$100,000 or more shall file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. Sec. 1352. Each tier shall also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the recipient. See 29 CFR part 98.

Copeland Anti-Kickback Clause - Copeland "Anti-Kickback" Act (18 U.S.C. 874 and 40 U.S.C. 276c)--All contracts and subgrants in excess of \$2000 for construction or repair awarded by recipients and sub-recipients shall include a provision for compliance with the Copeland "Anti-Kickback" Act (18 U.S.C. Sec. 874), as supplemented by Department of Labor regulations (29 CFR part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or subrecipient shall be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which one is otherwise entitled. The recipient shall report all suspected or reported violations to the Federal awarding agency.

Access to Contractor's Records - all negotiated contracts awarded by the grantee or sub grantee shall include a provision to the effect that the grantee, sub grantee, the Office of Inspector General of the United States, Comptroller General of the United States the U.S. Department of Labor, or any other duly authorized representatives, shall have access to and the right to examine all records, any books, documents, papers and records

Example

of the contractor which are directly pertinent to the specific contract for the purpose of making audit, examination, excerpts, copies and transcription; and will establish a proper accounting system in accordance with generally accepted accounting standards or agency directives. Reasonable access to personnel for purposes of interviews and discussions related to such documents shall be permitted.

Maintenance of Records - contractors shall maintain all required records for three (3) years after the grantees or sub grantees makes final payment and all other pending matters are closed. The records shall be sufficient enough to detail the significant history of procurement. These records will include, but are not necessarily limited to the following: rationale for the method of procurement, selection of contract type, contractor selection or rejection, and the basis for the contract price.

Single Audit Act - all recipients/subrecipients of federal funds that expend \$500,000 or more in Federal awards/funds in a year are required to obtain an annual audit in accordance with the Single Audit Act Amendments of 1996, OMB Circular A-133, OMB Circular A-133 Compliance Supplement and Government Auditing Standards. The audit may be a program specific audit instead of an agency wide single audit.

Conflict of Interest & Personal Gain - All contracts will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.

Rights to Inventions Made Under a Contract or Agreement - Contracts or agreements for the performance of experimental, developmental, or research work shall provide for the rights of the Federal Government and the recipient in any resulting invention in accordance with 37 CFR part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.

XII. Extensions and Modifications of this MOA

This MOA is a complete representation of the responsibilities of the parties to this agreement. This contract may be extended. If so, {Principal} will give {Cooperative Partner} as much notice as possible. Modification or extension of the terms of this agreement may be made only in writing and only if signed by both parties.

For:
{Principal}

Signature
{Name}
President/CEO
Date: _____

For:
{Cooperative Partner}

Signature
{Name}
Senior Pastor
Date: _____

Example

{Principal} Faith and Community-Based Model

Program Description

Background

The {Principal}'s Faith and Community-Based initiative facilitates partnerships (resources and technical assistance) between {Principal} and faith-based organizations and community-based organizations, aimed at providing supportive programming to men and women during their transition from prison. This initiative provides job training and placement, case management, and faith-based mentoring services to over 300 men and women returning to Cook County's neighborhoods most affected by prisoner reentry (Englewood, East Garfield Park, Auburn Gresham, Austin, Harvey, and Maywood). Mentors from the faith community and {Principal} Reentry Counselors are the anchors of this support. Services are provided in the community. Funding for this initiative is provided by the U. S. Department of Labor (President's Reentry Initiative), the Mayor's Office of Workforce Development (MOWD), and Public/Private Ventures (PPV).

Partners

The {Principal}, a non-profit organization established in Illinois in 1972, is the largest and oldest provider of employment services to people with criminal records in the United States. The {Principal} serves over 9,000 people with criminal records each year in employment and educational services.

Saint Sabina is an African-American Catholic Church, with 2,000 members and a social justice emphasis. The church provides services to the community through its St. Sabina Academy (pre-K - 8th grade), the ARK community youth center, the Social Services Center, and the Employment Resource Center. Target Communities: West Englewood and Auburn Gresham.

People's Church of the Harvest C.O.G.I.C. is a Christian Resource Facility that links resources and people together to improve the community. The church has 400 members. The church provides daycare before and after school, has a monthly food and clothing giveaway, and offers G.E.D. classes and job training and placement in custodial maintenance. Target Community: East Garfield Park.

Ambassadors for Christ is a non-denominational, community-based church with 800 members and a focus on community organizing (Target) and the provision of family resources (food, clothing, and emergency assistance). Through its community organizing, Target has successfully advocated for the removal of legislative barriers that impede employment options for those with felony convictions. Target Communities: Englewood and Auburn Gresham.

Trinity United Church of Christ is the largest African-American United Church of Christ in the US with 12,000 members. It offers services around HIV/AIDs, substance abuse, housing, domestic violence, prison, prison correspondence, reentry, legal issues, social justice, African education, and employment, as well as over 30 other ministries. Target Community: Roseland.

{Cooperative Partner} is a community-based church with a membership of 700. The services that Mt. Vernon provides include a homeless food pantry, NA, AA groups, and a prison ministry. Mt. Vernon also provides ongoing workshops on male wellness, health awareness, domestic violence and youth prevention. Target Communities: Austin and East Garfield Park.

Vision of Restoration, Inc is the 501c3 organization of the 5,000 member Rock of Ages Baptist Church. It has a focus on community and economic development in Maywood. Targeted community: West Suburbs/Maywood.

Valley Kingdom Ministries is a community-based church with 2,500 members which offers prison ministries, drug treatment groups, food pantry, and HIV/AIDs services as well as other ministries. Target community: Harvey.

McDermott Center, dba Haymarket Center is a community-based adult detoxification, residential, and outpatient substance abuse treatment facility. Target Community: clients from all partners with significant treatment issues.

Program Components

Mentoring Component - Each faith partner facilitates small group mentoring, with faith-based mentors providing consistent biweekly group mentoring via a 2:4 mentor to mentee group structure. The faith partners recruit and select mentors. The {Principal} provides background screening, training, and mentoring supports. The Mentoring Center (Oakland, CA) provides mentor training with a focus on transformational mentoring.

Reentry Counseling - The {Principal} Reentry Counselors assist participants with resolving barriers to successful reentry, including the identification and leveraging of resources to assist returnees in their transition. Critical areas include assistance with housing arrangements and resource arrangements for substance abuse treatment, healthcare, mental health treatment, and legal assistance. The {Principal} Reentry Counselors are co-located and provide direct services to participants out of the partner sites. Specialty site (Haymarket) provides critical services to high risk participants, including treatment and housing.

Example

Employment/Retention Component – The {Principal} provides each participant with a full range of employment/retention services, including assisting participants in acquiring basic employability and life skills, as well as training and employment placement and retention.

Community Sites

The {Principal} headquarters serves any individual with a criminal record:

{Principal} Headquarters
(West Loop)
{Address }

The following sites serve individuals ages 18-up, within 180 days of their release:

Ambassadors for Christ
{Address }

People’s Church of the Harvest COGIC
{Address }

The following sites serve individuals of all ages, within 180 days of their release, who have no homicide, sex offense, aggravated assault, or armed robbery convictions:

{Cooperative Partner}
{Address }

Valley Kingdom Ministries
{Address }

Vision of Restoration, Inc.
{Address }

St. Sabina Catholic Church
{Address }

Trinity United Church of Christ Village Center
{Address }

McDermott Center (Haymarket)
{Address }

Example

Section 6: Action Planning

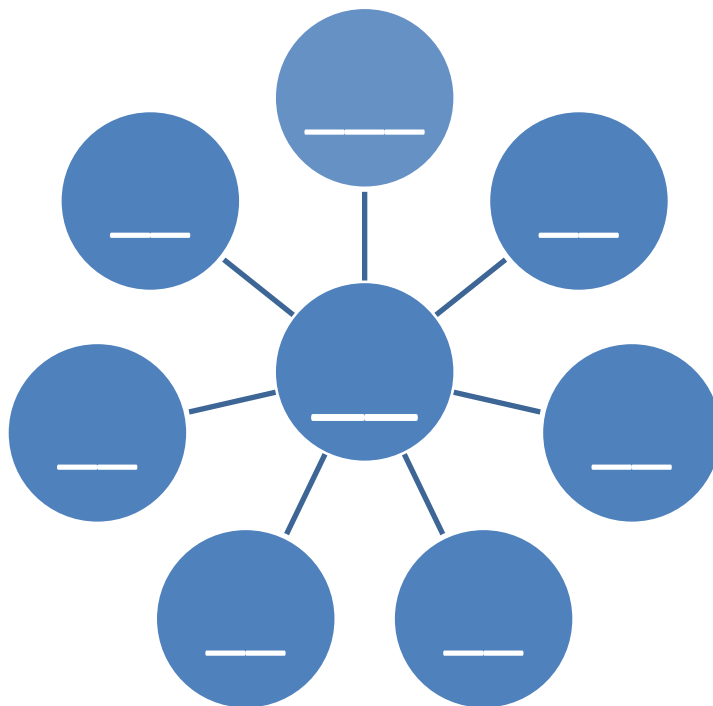
Objectives:

- Actively engage participants in community-specific dialogue related to developing or expanding collaborations needed to successfully address needs of TANF-eligible families and individuals.
- Understand concepts of community asset mapping and action planning as capacity building strategies.
- Engage in developing a community-specific action plan based on Ideas for Action that can become a living document.

Using the Basic Radial Design below, list your organization in the center.

- Start by listing your current partners then add potential partners.
- Compare your Asset Map to that of your TANF/FBCO Partner.

Do you currently partner with some of the same organizations? Are there organizations on one map, that should also be on the other? How can you work together to create one map that serves TANF-Eligible Families?



After talking with your partner, what other organizations should be on your map? Why?

Potential Partners	Why

Action Planning

Goal: To reflect on what a successful collaboration entails.

Activity: Reflect on activities, presentations, and discussions on collaborations.

How has your organization begun to build (or maintain) a partnership like those discussed thus far?

1

In what ways could (or has) your organization benefit(ed) from a partnership like this one?

2

What challenges would your organization face (or has faced) in building a partnership like this one?

3

What resources are needed to develop or enhance similar partnerships?

4

Action Planning

Goal: To develop an action plan for incorporating successful partnerships.

Activity: Using the goals identified in Activity 2, fill in the action plan template on the following page to determine objectives to help you reach your goals. Identify the action steps needed, people responsible, the time frame, potential challenges and responses to challenges, what supports and assistance will be needed, and how you will measure success. Two examples are below.

Target questions: What do you wish to achieve? How will you get there? Do you need to involve other people/programs? Do you have a target implementation date? What other resources do you need?

Example Goal #1: Explore Partnership Options

<i>Action Steps</i>	<i>Responsible Parties</i>	<i>Time Frame</i>	<i>Potential Challenges & Responses to Challenges</i>	<i>Supports & Assistance Needed</i>	<i>How will you measure success?</i>
1. Locate a WIA-funded center near me and schedule an appointment with its manager or director	Director or Manager	2 weeks	<ul style="list-style-type: none"> • Scheduling conflicts 	<ul style="list-style-type: none"> • Leadership support 	<ul style="list-style-type: none"> • Identification of a center
2. Organize special events for program participants on how to access the WIA system or organize a field trip	Manager	1 month	<ul style="list-style-type: none"> • Center in area easily accessible for families 	<ul style="list-style-type: none"> • Trainer based locally or willingness for distance-based training 	<ul style="list-style-type: none"> • Number of events hosted around employment-related issues
3. Establish mutual referral relationships	Director or Manager	3 months	<ul style="list-style-type: none"> • Buy-in from Board • Buy-in from staff responsible for referrals 	<ul style="list-style-type: none"> • Managerial and staff support 	<ul style="list-style-type: none"> • Number of cross-referrals made each month

Goal _____

<i>How will you measure success?</i>	
<i>Supports & Assistance Needed</i>	
<i>Potential Challenges & Responses to Challenges</i>	
<i>Time Frame</i>	
<i>Responsible Parties</i>	
<i>Action Steps</i>	

Goal _____

<i>Action Steps</i>	
<i>Responsible Parties</i>	
<i>Time</i>	
<i>Potential Challenges &</i>	
<i>Supports &</i>	
<i>How will you measure</i>	

Supporting Materials

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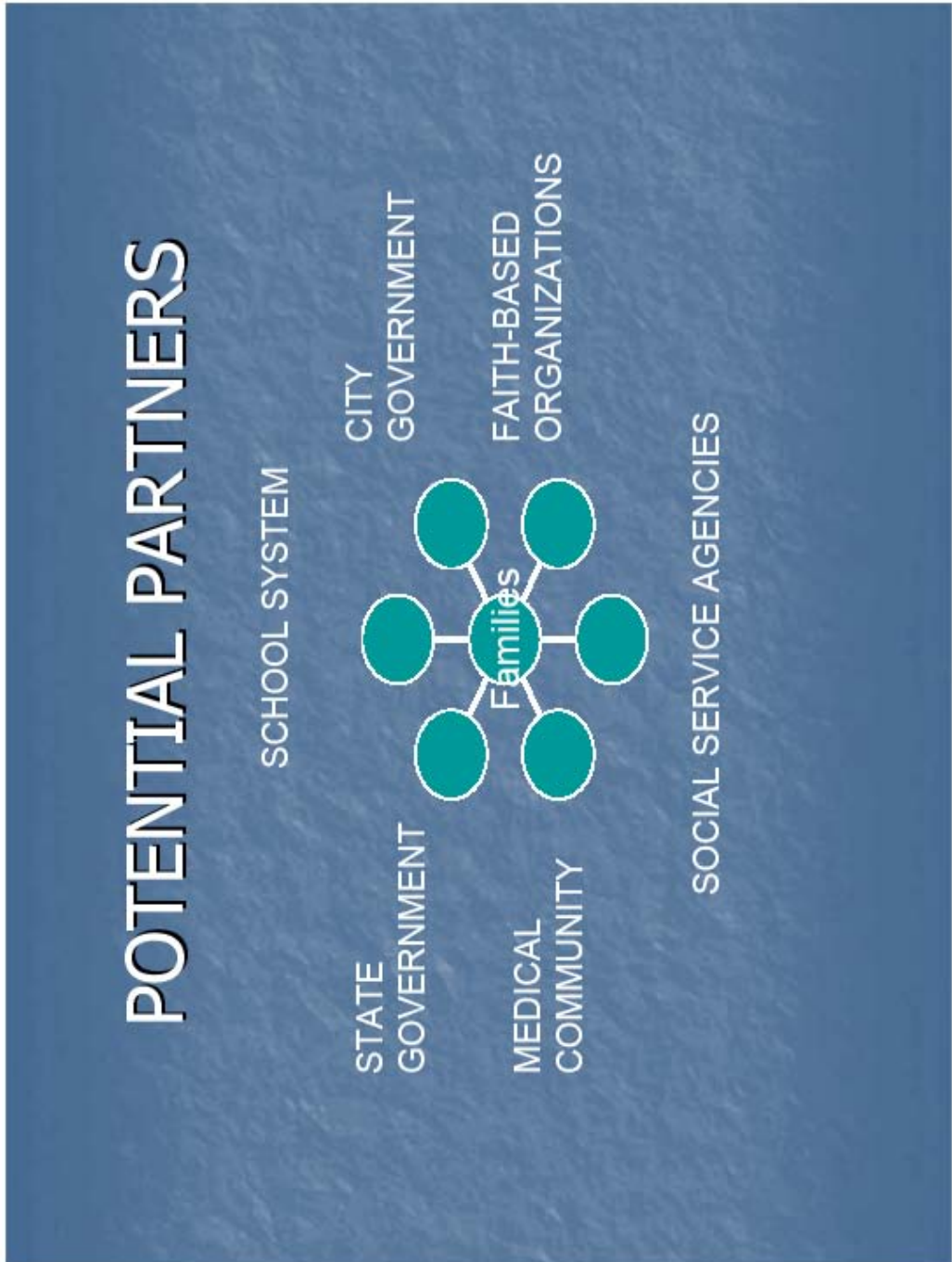
Sample: Community Asset Maps



Figure 2.6 Interagency Linkage Map

- 1. Agency.
- 2. Organizations with which Agency 1 is currently or potentially involved in exchange relationships.
- 3. Current or likely linking mechanism.

Sample: Community Asset Maps



Participant Survey

TANF Faith-Based and Community Partnerships Collaboration Institute

Thank you for participating in the TANF/FBCO Collaboration Institute. Please take a moment to complete this form. Your responses will help OFA determine if the Institute met your needs and plan future events. Responses to these questions will be reported only in aggregate.

Please place an 'x' to indicate the extent to which you agree or disagree with the following statements about the Institute.

- 1 – I Strongly Disagree with this statement (SD). 4 – I Agree with this statement (A).
 2 – I Disagree with this statement (D). 5 – I Strongly Agree with this statement (SA).
 3 – I Neither agree nor disagree with this statement (N). NA – Not Applicable (NA).

I represent: Federal Agency State TANF Local TANF FBCO

	SD	D	N	A	SA	NA
Section 1: TANF-FBCO Collaboration Overview						
I have a better understanding of Charitable Choice and its implications for TANF/Faith Partnerships.						
I have a better understanding of Readiness Factors and organizational capacity as defined in the Analytical Report.						
Section 2: Volunteer Management						
I have a better understanding of different types of volunteers and using volunteers to build organizational capacity.						
I have a better understanding of volunteer management.						
I found the <i>Volunteer Position Development</i> Activity helpful						
I found the funding information helpful.						
Section 3: Organizational Infrastructure						
I have an increased awareness of the importance of appropriate organizational infrastructure including having defined roles and responsibilities, written job descriptions and written policies related to administrative oversight.						
I better understand the importance of administrative capacity to track data and use data to inform program decisions and measure outcomes.						
I better understand the importance of creating a collaborative culture that actively seeks and nurtures partnerships including dedicated staff, strategic internal policies and consideration of co-locating services.						
I found the <i>Staffing Plan</i> Activity helpful.						
I found the <i>Organizational Self-Assessment (FBCOs)</i> helpful.						
I found the <i>Collaboration Assessment (TANF Office)</i> helpful.						
Section 4: Table Topic Lunch Discussion						
The table topic discussion was helpful as preparation for the Action Planning afternoon session						

Section 5: Interagency Communication						
I learned new strategies for initiating and maintaining win-win collaborative partnerships.						
I better understand the distinctions and appropriate uses of Partnership Agreements, Memorandum of Understanding (MOU) and Performance Based Contracts.						
I learned new strategies for overcoming communication barriers and developing inter-agency communication protocols.						
The <i>Partnership Agreement (Community Partner Activity)</i> was helpful.						
Section 6: Action Planning						
I better understand concepts related to community asset mapping and action planning as capacity building strategies.						
The <i>Interactive Asset-Map (beach-ball) Activity</i> was helpful.						
The <i>Community Asset Map (Community Partner Activity)</i> was helpful.						
The <i>Action Plan: Ideas for Action (Community Partner Activity)</i> was helpful.						
Overall						
The Collaboration Institute provided information that will be beneficial to my work.						
I would recommend this event to other TANF/FBCO groups wanting to collaborate.						

Please respond to the following:

Please indicate which presentation/activity of the day you found to be the **most** helpful:

Why? _____

Please indicate which presentation/activity of the day you found to be the **least** helpful:

Why? _____

Thank You!

Please turn this survey in to the table facilitator before leaving today's event!

Appendix E: Flash Drive Resources

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Appendix E - Flash Drive Resources

Immediately following each Collaboration Institute, participants who completed an evaluation were given a flash drive containing all the resources and activities used throughout the training event. This included tools such as the organizational assessment, an example of a performance-based contract, and other tools participating organizations could use in their own communities. The complete list of resources included on the flash drive is below.

- Activities from curriculum binder (for replication, if desired)
- Welfare Peer TA Overview
- Reference List
- Contact List
- Full set of supporting materials:
 - Analytical paper
 - WREC poster
 - *Snapshots of Success*
 - Case studies
 - Tools and resources
 - A TANF case study: “How a Public/Private Partnership Brought \$30 Million and 6,650 Jobs to Connecticut” (from Providence meeting only)
- Full set of Collaboration Institute activities:
 - Action-planning
 - Collaboration assessment
 - Community asset-mapping
 - Developing a staffing plan
 - Nonprofit organizational self-assessment
 - Partnership agreement activity
 - Volunteer position development