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Transforming Business As Usual and Advancing Innovation Through Public–Private Partnerships

Changing organizations that deliver public programs is complex and requires commitment throughout an organization and its larger environment. Particularly in human services programs, implementing change requires an upfront investment to understand the program environment, build trust and buy-in with staff at all levels of the organization, and address the programmatic challenges that can prevent changes from taking root. Foundations and other private organizations help programs innovate along the path of change by providing funding and technical assistance.

This brief describes lessons learned and potential strategies that technical assistance providers can use to encourage successful public–private partnerships. It also highlights considerations for funders of similar initiatives. Our lessons learned draw on a partnership between the Baltimore City Mayor’s Office of Employment Development (MOED), MOED’s Workforce Reception Center (WRC), the Annie E. Casey Foundation (the Foundation), and Mathematica. Mathematica provided technical assistance to pilot and support program changes focused on prioritizing customers and their goals. The team used the Learn, Innovate, Improve framework to guide its work.¹ The lessons learned through this partnership promoted expanded use of evidence-informed practices with other MOED programs.

Background

MOED’s WRC provides employment and training services to Baltimore City residents, including those receiving Temporary Assistance for Needy Families (TANF) benefits. In fiscal year 2020, 59 percent of TANF recipients in Maryland were Black, and around 86 percent also received Supplemental Nutritional Assistance Program benefits. On average, TANF recipients in Maryland had 1.8 children also receiving TANF.²

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Using Goal4 It!™ with Temporary Assistance for Needy Families (TANF) customers

Goal4 It!™ is a service delivery curriculum based on what we know from neuroscience and behavioral science about how to build adult capabilities. The curriculum builds customers’ capabilities and motivation to set goals, develop plans to achieve them, execute those plans, and reflect on their achievements. Developing these skills helps people chart a path to economic independence and reach other life goals. Focusing on customers’ strengths and goals, rather than compliance with TANF program rules, helps staff create more meaningful and supportive relationships with customers, which research shows is key for building capabilities. ▲

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MOED, the Foundation, and Mathematica formed a partnership to help WRC staff use Goal4 It!™ with WRC customers (see box). The goal was to help the center’s highly committed staff refocus on achieving customers’ goals rather than fulfilling compliance requirements. MOED leaders recognized that their staff want to “do everything they can for the people they serve” and viewed Goal4 It!™ as a way to provide an evidence-informed approach to helping WRC



customers. In addition to helping focus services on customers' goals, MOED leaders believed this shift would motivate staff to follow a consistent service delivery approach and help supervisors better identify areas for support and coaching. Mathematica trained WRC career development facilitators to use the Goal4 It!™ model with customers.

Lesson 1. Building meaningful relationships lays the groundwork for initiating change

Using existing relationships and building new ones with program leaders, staff, and customers are the first step for success. Organizations providing technical assistance need to spend time learning from program leaders, staff, and customers. Doing so illuminates the program's culture, successes, challenges, and opportunities for change. Building these relationships also offers a window into the goals and motivations of the staff implementing a new practice. Simply put, change will not last if you can't gain the buy-in, cooperation, and enthusiasm of staff and leaders.

Mathematica built trusting relationships with staff at MOED and WRC. These relationships enabled staff to share authentically about challenges to and opportunities for embracing new ways of working. Ultimately, the technical assistance team cultivated positive relationships with WRC leaders and staff. However, they also encountered challenges along the way.

Success factors

- / Leaders from MOED, WRC, the Foundation, and Mathematica collaborated in meetings to describe their goals for the partnership and offer input on how to best work together.
- / Mathematica led listening sessions with staff across levels and functions to understand their experiences and motivations. The team developed an understanding of the challenges facing the program, leader and staff readiness for change, and potential challenges to using Goal4 It!™.
- / Frontline staff volunteered for regularly scheduled working groups, led by Mathematica, which helped staff become invested in the partnership. The working groups also provided a venue for conversation, feedback, and relationship building. When the groups raised challenges to implementing Goal4 It!™, the meetings enabled staff to collaboratively propose and test solutions (see Lesson 2 below).
- / The Mathematica team visited WRC in person every other week for more than a year. During these visits, they convened working groups, provided general updates, and sought feedback from staff not participating in these groups. When it was time to scale up some changes, many staff were already familiar with them and bought into them.

Opportunities for improvement

- / The initial round of listening sessions included only a handful of frontline staff, which created concern among others that their input would not be heard. To address this, Mathematica conducted another round of listening sessions with all staff at WRC. This ensured that Mathematica heard all voices and reduced perceptions of favoritism. It also helped increase staff buy-in and set the relationships on a solid footing.
- / Mathematica did not formally assess WRC's readiness and ability to implement Goal4 It!™ or any other change. Doing so might have revealed many of the issues that emerged during implementation of Goal4 It!™ and helped the teams proactively plan for them. Formally assessing readiness for change likely would have revealed that because WRC regularly met its performance targets, motivating staff to do something new would be challenging. Although WRC met these compliance-focused targets, Goal4 It!™ was intended to help transform the lives of program participants in ways existing performance measures did not capture. Motivating staff to use different practices that could improve customers' lives requires leadership support and engagement to shift the staff mindset to focus on new definitions of success.

Lesson 2. Programmatic and compliance requirements can create barriers to implementation

Center staff and leaders were enthusiastic about implementing Goal4 It!™. The Mathematica team supported staff piloting the Goal4 It!™ curriculum with customers during customer orientation sessions. During that pilot, Mathematica met with participating staff every two weeks to collect their input on using the curriculum and hear about any challenges. The feedback revealed that administrative duties and requirements for documenting customer participation in required work activities presented challenges for implementing Goal4 It!™.

This feedback helped Mathematica and center leaders recognize the need to streamline staff administrative duties and reduce documentation requirements. A working group of leaders and staff from the center, MOED, and Mathematica came together to cocreate strategies to achieve these goals.

The group decided to pilot test providing center staff with dedicated time—free from telephone calls and walk-in customers—to complete administrative duties. Center staff selected from three available time slots to set aside each week. Mathematica developed and analyzed results from a time-use survey to document whether hours spent on administrative duties declined as a result. Baseline survey results showed that staff spent most of their time—about four hours per day—performing administrative tasks rather than serving customers.

Although staff liked having time to concentrate on administrative duties, center support staff struggled to keep track of schedules and continued to forward phone calls and client walk-ins during dedicated administrative hours. In response, Mathematica recommended reserving Wednesdays for administrative time. This was easy for support staff to remember, and professional staff were able to make better use of the dedicated time.

To address the challenge of streamlining paperwork, the Foundation connected WRC with the

Baltimore City Department of Social Services to open a dialogue and obtain a common understanding of required paperwork and data reporting. Center leaders and Mathematica collaborated on a plan to streamline paperwork and data entry so staff could meet all requirements using less time. This included eliminating some forms, combining others, and streamlining data reporting across systems. The City Department of Social Services reviewed the proposed changes to ensure they met requirements.

Success factors

- / Streamlining paperwork and data entry remains a work in progress, but the center is better positioned to implement and sustain changes moving forward. And using Goal4 It!™ often leads to staff spending more one-on-one time with customers.
- / This effort reduced required paperwork by 50 percent. Establishing dedicated administrative time lessened staff stress and hours spent on administrative duties. Further collaboration with the City Department of Social Services could help further streamline data reporting while ensuring compliance with state and federal requirements.

Opportunities for improvement

- / Paperwork and data reporting are integral parts of staff responsibilities, so creating change was difficult. Staff and leaders were accustomed to following these processes and resisted change despite support for the changes from MOED leaders. More effort to understand root concerns regarding the new processes would have been useful to develop mitigating strategies.
- / Establishing dedicated administrative time required support staff to keep track of the schedule of rotating days, take messages for staff, and inform customers that staff would not be available for appointments. However, they were not engaged in discussions about the initial pilot, and their supervisors communicated the changes to them instead. Engaging them earlier could have helped identify implementation challenges, develop procedures to mitigate them, and strengthen the approach.

Lesson 3. Helping programs make changes that stick requires buy-in and continued engagement from senior leaders

Although the Mathematica team interviewed front-line staff, supervisors, and center leaders early on, the team relied largely on frontline staff and supervisors to shape the direction of the work, including the need for dedicated administrative time. When implementation challenges arose, leaders from MOED needed to step in. Though not necessarily on the ground day-to-day, MOED leaders played a critical role in addressing long-standing bureaucratic challenges. Their buy-in and contributions were key to streamlining the paperwork and data entry that were bogging down staff and ensuring the program addressed compliance requirements.

Success factors

- / Cultivating relationships and clear communication between MOED and center leaders reduced bottlenecks and provided the support the center needed to break free from long-standing but inefficient practices and policies. It also paved the way for broader conversations about using these practices throughout MOED.
- / Near the end of the project, leaders from MOED and the City Department of Social Services participated in a training to use Goal4 It! to lead organizations and programs. This training helped them think innovatively about practices and policies that could best support the people they serve, staff providing those services, and the broader community. Ultimately, this training prepared the agency to integrate Goal4 It!™ into other MOED programs, including the Baltimore Health Corps.

Opportunities for improvement

- / Staff from MOED have many responsibilities across the city, and getting their regular participation was challenging. Although center staff knew it was a priority, they struggled to fully understand how it fit into their program goals.

- / MOED leaders felt they could have done more to motivate and create champions for change at the center. Meeting the work participation rate benchmark set by the City Department of Social Services has been a long-standing goal for the center. Moving away from that benchmark without an alternative way to measure performance created uncertainty for center leaders. Efforts by MOED leaders to bring WRC leaders more fully on board could have helped create additional champions for the work.

Lesson 4. Maintaining strong partnerships requires regular and open communication

Partnerships such as the one described in this brief—consisting of an administering organization, a service provider, a funder, and a technical assistance provider—can help connect resource-constrained programs with needed support. However, the structure can pose challenges, as neither the funder nor the technical assistance provider can make programmatic changes. Regular participation of agency leaders ensures suggested changes align with agency goals and demonstrates that the work of the partnership is a priority.

Success factors

- / In the second year of the partnership, leaders from MOED, WRC, the Foundation, and Mathematica held regular meetings to solidify the partnership. These meetings were an opportunity to ensure each organization's goals were met, to brainstorm solutions to challenges, and to clearly communicate with program staff about priorities.

Opportunities for improvement

- / Clarifying roles, level of involvement, and expectations for each partner at the start of the project could have moved the effort forward more quickly. By identifying these factors at the start of the project, the partnership could have developed structures for regular engagement and touch points to support timely decision making.

/ Creating open lines of communication with MOED through biweekly check-ins helped everyone understand progress and areas where involvement from MOED staff was particularly important.

Looking ahead

The COVID-19 pandemic diverted attention from the initiative, and the future of Goal4 It!™ at WRC is uncertain. However, MOED committed to using this approach to emphasize that serving people comes first in its programming. Drawing from the lessons provided in this brief, Mathematica successfully partnered with MOED and the Foundation to integrate the approach with the Baltimore Health Corps and will continue this work with Youth Opportunity

Baltimore. The goal is to work toward success by taking a close look at the organizational environment; shedding old, inefficient, and unnecessary processes; supporting staff to adopt and adapt; and orienting the culture toward new, evidence-informed approaches.

Endnotes

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² "Characteristics and Financial Circumstances of TANF Recipients, Fiscal Year 2020." Available at https://www.acf.hhs.gov/sites/default/files/documents/ofa/fy2020_characteristics_data_final.pdf.