



## Workshop Summary

**Title of Event:** Third New England Promising Practices Workshop in Collaboration With ACF's Welfare Peer Technical Assistance Network: Project Match and The Pathways System

**Date(s):** July 30, 1998

**Location:** John F. Kennedy Federal Building: Boston, Massachusetts

### I. Summary

The ACF Welfare Peer Technical Assistance Network, funded by the Administration for Children and Families, Office of Family Assistance, coordinated this one day workshop presentation by Ms. Toby Herr, the Founder of Project Match. Ms. Herr provided an in-depth description of the Pathways System developed through Project Match. This workshop was the result of a collaborative effort between the Welfare Peer Technical Assistance Network and the New England Promising Practices Workgroup. The technical assistance event was a multi-state workshop with a focus on providing participants with a thorough understanding of the Pathways System philosophy and approach to serving a large and diverse welfare population with serious or multiple barriers to employment and self-sufficiency.

### II. Participants

Workshop participants included representatives from the six New England states (Connecticut, Massachusetts, Maine, New Hampshire, Rhode Island, and Vermont). Others present were representatives from New York and West Virginia, as well as Ms. Lois Bell, Chief, Technical Assistance Branch, ACF, OFA.

## **I. Session Summary - Part One**

The workshop began with a welcome address and introductory remarks from Stanley Gardner of the Boston Regional ACF Office. Following the welcome by Mr. Gardner, Donalda Carlson from the Rhode Island Department of Human Services, and a member of the workgroup, introduced Ms. Herr.

### **A. Overview of Project Match and the Pathways System**

Ms. Herr gave an in-depth overview of the mission and goals of Project Match, a welfare-to-work program that has served public aid recipients in Chicago since 1985. The program's primary mission is to develop unique and flexible strategies to support participants just entering the labor market with an emphasis on providing comprehensive post-employment services that will support them in finding and keeping jobs.

Pathways was created through Project Match to provide a system of service delivery focused on job retention, re-employment, and job advancement assistance for welfare recipients. Pathways goes beyond traditional welfare-to-work approaches in that it:

- Acknowledges that most people move from welfare to work in an uneven, back and forth process, i.e., getting and losing jobs before settling into long-term employment, or experiencing personal or family crises that can impede progress toward employment.
- Broadens the definition of work preparation to include activities that traditionally are not considered by the welfare-to-work field, such as volunteer and self-improvement activities.

Pathways is designed to support participants' moving up an incremental ladder to economic independence, providing services as they move up, and sometimes, fall back down the ladder. The key is to keep participants actively engaged in the process wherever they are on the ladder.

The Pathways system incorporates four components that provide the flexibility necessary to address the needs of all welfare recipients from those who are job ready to those considered "hard-to-serve." The four components, described in detail in section D, are:

- 1) Monthly Activity Diary
- 2) Computerized case management tracking system
- 3) Rules and procedures for implementation
- 4) Monthly group meetings.

## B. A Review of the Pathways Off of Welfare

Pathways makes a long term commitment to its participants, based on the belief that support services are most effective when they are available on an as-needed-basis over time. Ms. Herr demonstrated this point by presenting a model that detailed five “pathways” participants can take to get off of welfare over a five-year period. Each pathway requires a different approach to providing employment, job retention, re-employment, and job advancement support services. Each pathway will also yield a different outcome in terms of participants’ ability to get and maintain employment, and leave TANF, over a five-year period.

The Project Match Model 5-Year Career Routes include:

### 1. Steady Worker/Advancement Route

The goal is to stabilize participants within two years by slowly preparing them for entry into the workforce with an emphasis on education and job readiness. Participants advance from part-time to full-time employment, receive a reduced TANF grant after the first year, and are totally off of TANF by the end of the second year. Participants continue to have access to individualized job retention support during years three through five as needed.

### 2. Welfare Cyclers Route

Participants who never quite stabilize in terms of consistency in their education and training and/or job retention will have cycles of going on and off of TANF. The goal here is to shorten the interval between jobs. Support is often needed to help participants deal with their complicated personal lives, so that they can stay employed for longer intervals of time.

### 3. Job Cyclers Route

Within this cycle participants may initially have difficulty completing their education and training or holding a job, but will begin to stabilize over time. They can be motivated to work at least part-time over the five-year period and receive a reduced TANF grant.

### 4. Non Job-Ready at Outset Route

Participants with no work experience or training can be encouraged to engage in volunteer activities that will help build their confidence and give them a sense of purpose. Over the five-year period, these participants will increase their involvement and learn the competency of being on time and organized. The objective is for their volunteer work to lead to employment and coming entirely off TANF at the end of five years.

## 5. Alternative to Work Route

Participants who are hard to employ are required to be involved in some form of activity each month in exchange for their TANF grant. This can include volunteering at a local hospital or Head Start program, or taking children to social enrichment or sports programs. At the end of five years they are still receiving TANF, but they are engaged in at least 30 hours a week of volunteer work.

### C. Description of the Pathways Support System

The Pathways system is designed to provide a support mechanism for welfare recipients regardless of the route they take to get off of welfare. The typical welfare-to-work program model often takes a more linear approach, which is specifically job focused, and may not always support the needs of welfare recipients.

The Pathways system focuses on providing both pre-employment and post-employment services that are structured so that participants who need support can access services as needed. For example, if participants have a personal setback, which causes interruptions in their progress and participation in the program, the system will pick up where they left off when they return. It is not required that they start at the beginning each time. Emphasis is placed on providing the appropriate support to participants as they move through various phases of personal growth and life circumstances. Pathways takes an over-time approach to addressing barriers to self-sufficiency, not assuming that such barriers preclude employment, and that a person's identity is defined by their problems. Therefore, Pathways service delivery is geared toward not only counseling and treatment of participants' "problems", but the provision of a wide range of support and assistance around those needs which form barriers to self-sufficiency, e.g., the need for child care, transportation, or housing assistance.

The Pathways support system assists participants in working toward self-sufficiency and economic independence by:

- Broadening the definition of what is considered work preparation activity, e.g., activities with children, volunteer work, community service, etc.
- Identifying activities that everyone can participate in regardless of their education or training, current employability, or personal circumstances.
- Letting participants choose what they want to do and then turning it into a work experience.
- Pushing participants to take a higher step on the economic independence ladder.

The basic assumptions underlying the Pathways system are that:

1. Welfare recipients in general are more likely to make progress in a mandatory system than in a voluntary one.
2. All recipients should be required to do something every month.
3. Each recipient must be encouraged and supported to find the best pathway for them.
4. The best approach to assessing readiness for employment is to give people choices at the outset and allow them to “sort” themselves based on their actual performance.
5. Most welfare recipients will need several jobs and a variety of services after they enter the workforce to eventually become steady workers.
6. Welfare programs must ensure that people make progress and are not hurt by the requirement to participate each month by:
  - defining work preparation in a broad and flexible manner
  - being flexible around time commitments
  - allowing people to combine activities
  - carefully monitoring progress each month
  - having sufficient staff to support people as they move from step to step

#### D. Description of the Pathways Components

##### 1. The Monthly Activity Diary

The activity diary and log tracks participants’ progress on a monthly basis. The eight-page booklet is completed each month by the participant and the caseworker, and it is turned in to the caseworker at the end of the month. The diary has a section for verifying that scheduled commitments, i.e., job interviews, training classes, etc. are kept. There is also a section for developing an employability plan, which is reviewed, and revised by the caseworker each month in order to keep participants moving through the process. The color of the diary changes each month to ensure that participants are providing up to date information and have a new plan of action each month. Certain sections of the activity diary, such as the activity menu, can be customized to meet the agency’s specific participation requirements.

##### 2. The Computerized Tracking System

The computer based tracking system is designed to capture all of the information participants provide in their completed diaries, which includes:

- what participants did during the month in terms of job training, job search, or employment preparation activities

- any benchmarks or objectives achieved, e.g., starting a job
- any actions taken by caseworkers such as referrals to counseling or reducing a TANF grant due to earnings.

Ms. Cheryl Stoneking, who designed the database for the tracking system provided a demonstration of how the data is entered and the monthly progress reports that are generated. Specific reports are distributed every month to caseworkers, agency administrators, and participants, which provide an ongoing record, over time, of progress for groups, and individual participants.

### 3. Pathways Rules and Procedures

Ms. Herr discussed the importance of flexibility in the rules and procedures for Pathways participation. One set of rules is that caseworkers must have monthly contact with participants. She suggests that agencies that use Pathways seek to customize rules and procedures to fit their needs. This includes policies regarding participation requirements, activity verification, caseworker actions, and other pertinent issues related to participation. The basic underlying principles of the Pathways approach (as summarized above) provide the basis for rules and procedures.

### 4. The Monthly Group Meeting

Ms. Herr conducted a role-play to demonstrate the way in which review and revision of the Monthly Activity Diary could take place in an individual or group setting. The purpose of the monthly group meetings is to provide a more efficient method of client contact in places where caseloads are too high to consider one-on-one contacts. Participants are assigned to groups that meet monthly. Specific standards for those meetings include:

- Participants are assigned to a permanent group early on in the process based on practical factors such as their schedules and where they live.
- Each group meets once a month on the same day each month.
- Each group can contain 50-60 people.
- Staffing for the meetings are done for the meetings in pairs, e.g., two caseworkers or a caseworker and a supervisor depending on the agency's needs.

The major objective of the monthly meetings is to review, revise, and fine-tune employability plans. These meetings are also helpful in providing peer support for participants.

## E. Response from Workshop Participants

Following the conclusion of Ms. Herr's presentation, Donalda Carlson gave workshop participants an opportunity to give some verbal feedback regarding their response to the Pathways System. The response was overwhelmingly positive; many participants stated that they could currently use various aspects of the system. Two major concerns were voiced: the amount of time and staff necessary to implement Pathways, and the ability to fully support the case management system with current technology and workload demands on that technology. Even given those concerns, participants felt it was an approach that has strong philosophical and practical applications.