Use of TANF Non-Assistance Funds:

Models and Strategies

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WORKSHOP SUMMARY

Event: **Use of TANF Non-Assistance Funds: Models and Strategies**

Date: **March 13-14, 2001**

Location: **Hilton Denver Tech Center-South**

1. OVERVIEW

The Welfare Peer Technical Assistance (TA) Network, funded by the Administration for Children and Families (ACF), Office of Family Assistance (OFA), Department of Health and Human Services (DHHS), assisted the Colorado Works Program, Office of Self-Sufficiency, Department of Human Services, in the planning and hosting of this workshop. The purpose of this technical assistance workshop was to explore new and innovative ways to use TANF non-assistance funds to serve low-income populations. The workshop was designed to allow key county social service staff to learn about existing programs outside the State, hear the Federal perspective relating to TANF non-assistance funds, and provide a forum for dialogue with the State social service office. Participants who attended included county commissioners, social service directors, and key administrative staff. Thirty-one county representatives from all over the State were present.

2. BACKGROUND

Colorado has devolved the authority to administer its TANF program to each county where a countywide “TANF eligible” limit is set. Similar to other States in which the TANF implementation is State supervised and county-administered, Colorado’s State TANF office now acts more as an advisor to its county offices. This workshop is part of the State’s ongoing efforts to provide assistance and guidance to Colorado’s counties. The topic of non-assistance funds was selected by the State for this workshop mainly in observance of existing welfare reform conditions, but it was also selected in response to an increasing number of inquiries from the county offices. In light of the State’s excess of TANF funds due to case load reductions, and its efforts to increase services to needy Colorado families, the State hopes to increase the number of local programs that are using non-assistance funds creatively to meet the four purposes of TANF. The state has had a County Diversion program since its inception of the TANF program in July 1997. It has been used primarily for clients with short-term barriers whose circumstances may not be appropriate for traditional “welfare” assistance.

3. USE OF TANF FUNDS – AN INTRODUCTION

On August 22, 1996 *The Personal Responsibility and Work Opportunity Reconciliation Act of 1996* (PRWORA) was signed into law. This legislation is a comprehensive bipartisan welfare reform plan that dramatically changed the nation's welfare system into one that requires work in exchange for time-limited assistance. This legislation represented one of the most dramatic shifts in Federal social policy in decades. The Temporary Assistance for Needy Families (TANF) program replaces the former Aid to Families with Dependent Children (AFDC) and Job Opportunities and Basic Skills Training (JOBS) programs, ending the Federal entitlement to assistance. Under the new legislation, States and Territories operate TANF programs, and Tribes also have the option to run their own TANF programs. States, Territories, and Tribes each receive a block grant allocation with a requirement on States to maintain a historical level of State spending known as Maintenance of Effort (MOE). The total Federal block grant is $16.8 billion each year until fiscal year (FY) 2002. The block grant covers benefits, administrative expenses, and services. States, Territories, and Tribes determine eligibility and benefit levels and services provided to needy families.

The 1996 welfare legislation gives States enormous flexibility to design their TANF programs in ways that promote work, responsibility, and self-sufficiency, among families. Except as expressly provided under the statute, the Federal government may not regulate the conduct of States.

States and localities (and their contractors) may use TANF funding (and State MOE funds) in any manner "reasonably calculated to accomplish the purposes of TANF." Section 401(a) of the *Social Security Act of 1996* contains the exact language on the TANF purposes. In general, these four purposes are to:

1. Provide assistance to needy families so that children may be cared for in their own homes; or in the homes of relatives;
2. Reduce dependency of needy parents by promoting job preparation, work and marriage;
3. Prevent out-of-wedlock pregnancies; and
4. Encourage the formation and maintenance of two-parent families.

Given these four purposes, and the flexibility allowed for using Federal and State funds to develop innovative services, States and localities are now faced with a variety of choices. Consistent with these purposes, TANF and State MOE funds could be used to support any of the following services:

- Support for work activities
- Child Care
- Transportation
- Education and Training
- Enhancing family income or assets
- Mental health and substance abuse services (not medical services)

- Domestic violence services
- Developmental and learning disabilities services
- Child welfare services
- Family formation and pregnancy prevention programs
- Community development programs

For more details on PRWORA, refer to the Administration for Children and Family's Fact Sheet at www.acf.dhhs.gov/programs/opa/facts/TANFpr.htm.

Over four years have passed since this Federal legislation gave States broad authority to restructure their welfare systems. The early TANF years have demonstrated that this approach, coupled with policies such as expanded Federal Earned Income Tax Credit, and strong economic growth, can lead to increased employment. Employment rates among welfare recipients and low-income women more generally have climbed sharply in the past four years. This increase in work has contributed to dramatic declines in the number of families receiving welfare in many States. Welfare caseloads across the nation have fallen by half of their peak in 1994.

Despite the recent successes of welfare reform, there are still daunting challenges remaining. The unfinished agenda of welfare reform is reflected in three realities:

- Most parents leaving welfare for work earn too little to support their families
- Some families have left or been dropped from the welfare rolls without work
- Many families remaining on welfare have very serious unmet needs

Some States and localities are utilizing the flexibility that now exists in the welfare program to respond to this unfinished agenda with new initiatives or program modifications. Some analysts describe this shift as the next phase of welfare reform. The challenge for this next phase is to develop effective, broad-based strategies for assisting parents with barriers to work; increasing the sustainability of works through key supports; helping parents secure the education, training, or work experience they need to secure better paying jobs; and reducing poverty among families and children. It has been predicted that within this next phase of welfare reform an extraordinary "window of opportunity" has emerged that markedly enhances prospects for States' success (Sweeney, et.al. 2000).

The issue of how TANF funds are used has become increasingly important with the progression of welfare reform. Some experts support reserving funds in case of an economic downturn. Others urge their being invested in services for hard-to-serve welfare recipients and a broader low-income population. Examining the use of State TANF funds now is critical because of approaching time limits on the receipt of TANF, and the likely focus on TANF funding levels in the upcoming reauthorization of welfare reform legislation in 2002.

Under Federal regulations, States may spend Federal TANF funds on "non-assistance," such as work supports for low-income families, without triggering Federal time limits or affecting work participation rates. Consequently this aspect of the TANF legislation offers additional opportunities for States to increase the focus on self-sufficiency and to develop programs and initiatives that will greatly improve the lives of low-income families. (Copeland, 2000).

4. WELCOME COMMENTS

On behalf the offices of ACF Region VIII and the Colorado Works Program, the following are highlights from the workshop's opening speakers.

4.1 Ed Lazo, Deputy Regional Administrator, Region VIII, Administration for Children and Families, Department of Health and Human Services

Mr. Lazo welcomed workshop participants on behalf of Beverly Turnbo, Regional Administrator-Region VIII, who was unable to attend due to illness. He thanked everyone for attending and reminded participants that the regional office supports their innovative ongoing initiatives that are taking place throughout the State on behalf of families who are struggling to obtain self-sufficiency. He also made a few announcements. He reminded participants that they would soon be receiving an announcement about the national welfare reform conference *Report Card: Examining the Past For A Better Future* that will be held in Washington, DC, on September 5-6, 2001. Mr. Lazo encouraged counties to attend. The second announcement he made was to remind participants about the wealth of welfare-related information available to counties on the Welfare Peer Technical Assistance Network's web site at www.calib.com/peerta.

4.2 Danelle Young, Manager, Office of Self-Sufficiency, Colorado Department of Human Services

Ms. Young welcomed participants and expressed her enthusiasm for having such a variety of speakers representing various aspects of welfare reform implementation. She observed that counties are now moving into "phase two" of welfare reform and indicated that she hoped the programs featured at the workshop would be of value to them. This next phase, she went on, will offer increasing challenges to counties. Time limits will become more of an issue and counties are now finding there is an increasing need for innovative ways to serve the distinct types of populations that remain on welfare rolls. Through the sharing of innovative models, such as the ones at this workshop she noted, counties will be able to gain fresh insights into program strategies. The "hard-to-serve," Ms. Young went on, represent a collective group of welfare recipients that counties will need to focus on in the coming months. She emphasized the importance of the collaborations that are needed at the county, State, and Federal levels to address these welfare recipients. She pointed out that these clients are frequently referred to collectively, but they are actually many different types of clients who have very diverse and unrelated needs. By collaborating with various community organizations, she suggested, counties can more effectively address these clients' needs. Another challenge she mentioned to the group that will become prevalent soon is those hard-to-serve clients who are beyond their time limits. The State will need to reexamine these cases in light of its 20% hardship exemption criteria. Another area that Ms. Young felt needed more emphasis was wage progression and job retention for low-income workers. She suggested to counties that they refer to promising practices and models from other States for more innovative program ideas in this area. A final area she mentioned where counties should consider exploring promising practices and models from outside the State is community investment strategies.

5. NATIONAL PERSPECTIVE: USE OF TANF NON-ASSISTANCE FUNDS

This session focused on the differences between assistance and non-assistance, fiscal and policy backgrounds, and on providing ideas for using TANF funds for non-assistance purposes. Definitions of both terms were reviewed and examples of some possible uses of funds were then discussed. The session concluded with a review of Colorado's perspective on the use of TANF funds.

5.1 Background- The TANF Final Regulations (combined presentation)

Office of Family Assistance, Administration for Children and Families, Department of Health and Human Services: Mack Storrs, Senior Program Specialist
and
Center for Law and Social Policy: Mark Greenberg, Senior Staff Attorney

TANF block grants were set to reflect AFDC related spending in or near 1994-1995. Since block grant funding levels will stay basically the same through 2002 and there have been large declines in cash assistance caseloads, funds are potentially available for other uses.

The needs of low-income families outside of welfare are receiving increasing recognition. These needs can be classified in some of the following areas.

- Families who have left assistance and are working, but in a low paying job
- Families who could avoid assistance with other types of help
- Efforts to reduce out-of-wedlock pregnancies, encourage and maintain two-parent families
- Activities aimed at helping fathers, youth, and children

According to the TANF final regulations (64 *Federal Register* 17720, April 12, 1999), there are three ways in which a State may spend TANF funds:

i. Transfer: The State can transfer funds to other block grants. Up to a total of 30% of TANF funds can be transferred to the Child Care and Development Block Grant and to the Social Services Block Grant (Title XX), provided that no more than 10% can be transferred to Title XX, and Title XX transfers must be for services to children and their families below 200% of poverty; and, effective with FY 2001, no more than 4.25% of the State's TANF grant may be transferred to Title XX.

ii. Previously Authorized: Unless otherwise prohibited, a State may spend TANF funds in any manner that the State was authorized to use the funds under a set of programs (AFDC, JOBS, Emergency Assistance, AFDC Child Care, Transitional Child Care, At-Risk Child Care) on September 30, 1995, or at State option, August 21, 1996.

iii. Reasonably Calculated to Accomplish a TANF Purpose: Unless otherwise prohibited, a State may spend TANF funds in any manner reasonably calculated to accomplish the purpose of TANF.

There are other restrictions on the use of TANF funds. Apart from these specific TANF provisions, one should also keep in mind that allowable uses of TANF funds are also affected by the requirements of 45 C.F.R. Part 92 and by the requirements of OMB Circular A-87.

If an expenditure is an allowable use of TANF, the expenditure may fall within the TANF definition of assistance. The TANF statute did not define assistance. The TANF final regulations provide a definition of assistance. The intention was to allow the States more flexibility. When TANF is spent for assistance, a set of assistance-related requirements apply. These assistance-related requirements do not apply when TANF funds are spent for non-assistance. Guidance on this from the TANF final regulations follow below.

a. Assistance-related requirements:

i. Time Limits: The State may not use Federal TANF funds to provide assistance to a family that include an adult head of household or spouse of the head of household who has received Federal TANF assistance for sixty months (subject to limited exceptions).

ii. Work Participation Requirements: If a family including an adult or minor parent head of household receives TANF assistance (whether federally funded or state funded), the family is considered part of the State's caseload for purposes of TANF participation rate requirements.

iii. Child Support: A family receiving TANF assistance (whether federally funded or state funded) is required to assign its child support to the State.

iv. Prohibitions: A set of prohibitions bar the State from providing TANF assistance (or in some cases, federally-funded TANF assistance) to certain groups of families and individuals.

v. Data Collection: A set of data reporting requirements apply to those receiving TANF assistance (whether federally funded or state funded).

vi. Family: Must be for a family in which a minor child is residing with a parent or relative (or is temporarily absent).

vii. Income: Family must be financially “needy” (low-income).

b. According to the final TANF regulations, the Definition of Assistance is as follows:

"Cash, payments, vouchers and other forms of benefits designed to meet a family’s ongoing basic needs (i.e., for food, clothing, shelter, utilities, household goods, personal care items, and general incidental expenses) even when conditioned on participation in a work experience or community service activity.” It also includes supportive services such as transportation and child care provided to <u>non-employed families.</u>

c. Final regulations specify seven exclusions from the definition of assistance. (Exclusions from the definition of assistance are commonly referred to as “non-assistance.”) One should also keep in mind that even if a benefit or service is not expressly excluded, it still is not “assistance” unless it falls within the regulatory definition. The seven express exclusions are:

i. Nonrecurrent short-term benefits which:

(1) are designed to deal with a specific crisis situation or episode of need;

(2) are not intended to meet recurrent or ongoing needs; and

(3) will not extend beyond four months;

ii. Work subsidies (i.e., payments to employers or third parties to help cover the costs of employee wages, benefits, supervision, and training);

iii. Support services such as child care and transportation provided to families who are employed;

iv. Refundable earned income tax credits;

v. Contributions to and distributions from Individual Development Accounts;

vi. Services such as counseling, case management, peer support, child care information and referral, transitional services, job retention, job advancement, and other employment-related services that do not provide basic income support; and

vii. Transportation benefits provided under a Job Access or Reverse Commute project to an individual who is not otherwise receiving assistance.

d. Non-assistance requirements:

i. Must be allowable TANF spending

ii. If authorized under 1^{st} or 2^{nd} purposes of TANF, the funding must be for a “needy” (low-income) family or parent. (Under Federal law, each State is allowed to define “needy”-i.e., family income level, resources, etc. This means that purpose 3 and 4 of TANF are not designated solely for “needy” families. This enables States to develop community-oriented programs with a prevention-oriented approach.) (In Colorado, a family income of under $75,000 qualifies a family as “needy.”)

iii. If a “Federal public benefit,” certain restrictions on providing benefit to immigrants apply

e. TANF spending for assistance and non-assistance: Under the TANF final regulations, a State may spend current year TANF funds for assistance or non-assistance. However, effective October 1, 1999, a State may only spend carryover funds (i.e., TANF funds from a prior fiscal year) for assistance and related administrative costs.

5.2 New Opportunities Using TANF Non-Assistance Funds

Mr. Storrs and Mr. Greenberg continued their presentation by offering counties suggestions and examples related to the use of TANF non-assistance funds.

There are several key points to keep in mind when using TANF funds for non-assistance TANF expenditures need not be limited to families receiving TANF cash assistance. In TANF, all expenditures are either assistance or non-assistance. The assistance expenditures are subject to the requirements listed above (i.e., time limits, data collection, etc.). Non-assistance has few restrictions (see above) and can provide a range of opportunities to help families outside the traditional welfare system.

There are two considerations that a State or county must address when considering the use of TANF funds for any new service or program. The first question to ask is whether the use of funds is allowable. States/counties should review the regulations to determine this. Any expense must serve one of the four purposes of TANF. The second question to ask, assuming the use of funds will serve one of the four purposes of TANF, is whether it would be considered assistance or non-assistance. Appropriate guidance can then be followed according to the TANF regulations.

In addition to the TANF final regulations, an additional source of guidance is the TANF funding guide that was released in May 1999 by the Office of Family Assistance. The guide, *Helping Families Achieve Self-Sufficiency- A Guide on Funding Services for Children and Families through the TANF Program,* does not contain new rules or policies. Rather, it describes how States may use Federal and State MOE funds to support working families and to address the needs of clients with barriers to self-sufficiency. The guide is a reference tool that is meant to promote creative thinking about potential services, supports, and activities that States (and counties) might adopt to further the purposes of the TANF program. One section, *Considerations in Deciding Whether A Use of Funds is Appropriate,* outlines a step-by-step process to follow in determining how to best use available funds. Given the complexities of using TANF funds, it presents examples of the many flexible ways States (and counties) may use TANF and MOE funds. The guide is available on the OFA web site and can be downloaded at www.acf.dhhs.gov/programs/ofa/funds2.htm.

Another possible source of reference is the Office of Family Assistance web site *TANF Program Policy Questions* page at www.acf.dhhs.gov/programs/ofa/polquest/index.htm. There are a variety of questions and answers posted related to different aspects of the TANF program. Specifically, among other topics, there are several questions and answers listed that address the definition of assistance and the use of funds. Under *Use of Funds*, question numbers 1, 25, 26, and 30 relate to service and assistance to non-needy families as well as determining whether a family is needy.

The following are examples in which TANF non-assistance funds may be used for employed families:

- Child care
- Transportation
- Refundable earned income tax credits
- Matching contributions to Individual Development Accounts (IDAs)
- Employment entry or retention bonus
- Work experience allowance

The following are examples in which TANF non-assistance funds may be used for unemployed families:

- Services-e.g., employment services, training, barrier removal (such as mental health, substance abuse, domestic violence)
- Non-recurring benefits such as child care for short-term job search, emergency aid, bonuses, and incentives
- Subsidized employment

- “Transitional services” for applicants before basic cash assistance is approved.

This session was concluded after the group discussed specific examples using the considerations listed in the table below.

Considerations in Deciding How to Use TANF Funds	
Question to ask	Considerations
What are the benefits, services, activities to be provided?	Is it allowable under the TANF regulations? If yes, is it assistance or non-assistance?
What are the eligibility criteria?	Financial criteria for the needy Objective criteria
Which funds should be used?	Federal, State, or a mix (co-mingled)
What requirements, restrictions, limitations, apply?	To individuals receiving the service, benefit, etc. With respect to the selected service or activity

5.3 The State Perspective: Use of TANF Non-Assistance Funds

Kevin Richards, Colorado Works Manager, Colorado Department of Human Services offered the following comments to the group.

Mr. Richards began by announcing that the State is moving forward in the approval process for House Bill 1169. This legislation should remove some of the administrative requirements related to community resource investment initiatives using non-assistance funds. It will eliminate the requirement for an application and an individual responsibility contract for this type of non-assistance. However, counties will still have the option to continue to do so at their own option.

A second point Mr. Richards made was in reference to the issue of how the State chooses to spend its Federal TANF funds in relation to State funds. Currently, all of Colorado’s TANF services are provided for using co-mingled funds (Federal and State mixed). Due to the flexibility in service delivery of programs funded by using either segregated funds or a separate State program altogether, the State is actively exploring its options regarding revising its current funding strategies for TANF programs and services.

In closing, Mr. Richards referred county participants to a recently released (March 12, 2001) agency letter from the Colorado Department of Human Services. The letter is meant to define Colorado Works Non-Cash/Non-Monetary Services (NC/NMS). It specifically addresses the following:

- How to determine eligibility for Colorado Works NC/NMS
- Types of services that qualify as NC/NMS
- How to implement NC/NMS at the county level
- How to report services through the County Financial Management System (CFMS)

6. PROGRAM STRATEGIES: THE REALM OF POSSIBILITIES

Two counties from outside the State of Colorado presented on programs and services they are providing to clients that exemplify the flexibility allowed in using TANF funds. They were selected to present to Colorado's audience of counties for several reasons; 1)- their States have devolved the authority for TANF implementation to their county offices (similar to Colorado), 2)- both have a similar mix of rural and urban communities, and 3)- they have comparable populations and economic circumstances. The National Association of Counties (NACO) recommended both counties as potential presenters for this workshop. In addition, they both recently received NACO awards for innovative human service programs at the county level.

6.1 Sonoma County, California: Jerry Dunn, Director, Workforce Investment Board, County of Sonoma Human Services Department

Mr. Dunn began by providing participants with an overview of Sonoma County and the SonomaWORKS program. The California legislature responded to the 1996 Federal welfare legislation by creating the CalWORKS program. This program set statewide eligibility standards, but gave counties greater flexibility to design welfare-to-work activities. SonomaWORKS is the local program developed in response to these two major reforms of Federal and State welfare legislation.

The Sonoma County Human Services Department has since then planned and operated a much-reformed local welfare system. The Department developed an innovative service delivery model. It merged and co-located its workforce investment services along with its TANF services. Through separate State funding, the county also houses substance abuse counselors in the same offices. The county is now in the process of moving its child welfare services into the same facilities. In order to accomplish this, the county had to manage operational tasks such as acquiring space for one-stop centers, entering into various interagency agreements with dozens of service providers, completing personnel re-classifications, and marketing the new services to clients as well as stakeholders. Today, the Sonoma County Workforce Investment Board provides policy oversight for a series of one-stop centers. Collectively known as Job Link, these centers provide invaluable services for job seekers (at no cost) and employers as well as providing customized training and business development services to the entire community.

In Sonoma County today there are less than half the number of families on welfare than there were four years ago. Nearly 4,000 job placements have been recorded since SonomaWORKS began in early 1998. In addition, among clients who go to work, their average earnings have gone up. The Human Services Department is currently conducting an independent study to determine if families who have left welfare are better off today.

Mr. Dunn shared with participants some specifics regarding Sonoma County's human services budget. The county's budget for its welfare and employment and training services comes from an elaborate mix of Federal, State, and county sources. These sources include Federal and State TANF funds (with a local county match), State mental health and substance abuse funds, State child care funds, Federal Welfare-to-Work and Workforce Investment Act funds, and separate county funds. Another unique source of funding that the county receives are incentive funds provided by the State. This program is a State legislated effort to provide a portion of the State's welfare savings back to the counties. The funding is based on performance criteria such as caseload reduction, increased earnings, and welfare diversion success. Sonoma County has received a financial incentive award from the State every year since the program began (1998).

The county offers the following services to needy families that can be considered as TANF non-assistance funded (depending on each family's individual situation):

- Parent education
- Non-custodial parent services
- Mental health/substance abuse treatment
- Family Loan Program
- Domestic violence services
- Learning disabled services

Some of the other programs that the county operates are more flexible and address TANF purposes three and four (prevent and reduce out-of-wedlock pregnancies, encourage the formation and maintenance of two-parent families). Under purpose three, the county offers a school to career initiative, internships, mentoring, summer job opportunities, skills training, counseling, teen after-school programs, alternative school experiences, teen leadership development and parent programs, and other supportive services. Under purpose four, the county offers fatherhood programs and new baby home visiting services.

For more information on Sonoma County, visit its web site at www.sonoma-county.org.

6.2 Buncombe County, North Carolina: Jim Holland, Contract Manager, Buncombe County Department of Social Services

Mr. Holland first provided participants with a background on North Carolina's approach to welfare reform. The State's WorkFirst program began in 1995 and has three goals for its clients: welfare diversion, work, and job retention. The State has one of the most flexible approaches to TANF in the nation in the way it has devolved authority of TANF implementation to its counties. Counties can either be classified by the State as Standard or Electing counties. However, not all counties had a choice in their classification as some were classified at random by the State. The Standard counties adhere to the State's TANF plan, have a required MOE funding level of 90%, and receive State support. Electing counties are allowed more flexibility in their TANF plans (each county was required to write a WorkFirst plan), have a required MOE funding of 80%, receive limited State support, and meet State mandated standards. Since WorkFirst began in 1995, Buncombe County has experienced over a 70% reduction in its caseload level.

Unlike Colorado, North Carolina does not co-mingle its Federal TANF and State MOE dollars in determining how it will appropriate funds (TANF funds are segregated). In meeting its required county MOE funds, Buncombe County faced several dilemmas. One critical immediate need was a need for experts to help write the county's TANF plan, determine what services required community partners, and to draft requests for proposals for potential contracting community organizations. Community partnerships had to be considered in terms of whom the required participants should be and how to obtain community participation.

Using a creative mix of Federal, State, and county funds, the county has designed its *Partnerships for Working Families* Program to meet a broad range of services for both employers and employees. The program's mission is to help families provide for their needs through work. This program incorporates an innovative use of both assistance and non-assistance funding. In general, services such as child care, transportation, medical services, community services, general support services as well as employment/training wage supplementation services are provided by the county.

One program highlighted by Mr. Holland is the county's *Reverse the Cycle* Project. The primary objective of the project is to address the problems of families with significant employment barriers and to reduce or prevent their need for, or possible return, to cash assistance. The county has enjoyed great success in placing welfare recipients in employment and off of cash assistance. However, policy and funding limitations have prevented the agency from providing more long-term services to families leaving welfare to help them from returning to cash assistance. This project will enable the agency to do that. The project targets five populations: families with special problems (including child welfare cases), returning participants, non-custodial parents, homeless families, and sanctioned WorkFirst families. A comprehensive family support service team has been implemented to carry out the program. Services offered include housing, child care, transportation, and other basic needs in addition to providing employment training and support services. The program will offer more intensive case management, job training, retention, and readiness services than were previously available to clients. The project is an excellent example of inter-agency collaboration and creative use of funds.

Mr. Holland went on to describe how his county has developed and implemented TANF plans that can be tailored to specific county dynamics. He described Buncombe, a county of 206,000 people, in which the primary employer is the healthcare industry. While many jobs are available, few of those jobs provide the livable wage of $13/hr.

Although TANF caseloads continue to decline, he pointed out, a drop in caseload levels does not translate directly to increased self-sufficiency. Mr. Holland emphasized the importance of organizations collaborating to serve the needs of the community. As he explained, "We cannot do what we do in a vacuum. This is why we contract." For Buncombe County, contracting services is a key aspect of the county's service delivery. The partnerships established that contribute to the *Partnerships for Working Families* program are an example of the high level of emphasis that the county places on contracting.

In order to have effective service contracts, as well as interagency collaborations, organizations must communicate on a regular basis about the populations they serve. Buncombe County has an infrastructure in place that allows data sharing between agencies. Interagency agreements provide a foundation for the trust and commitment that allows activities such as the *Reverse the Cycle* Project to be successful.

In establishing any service or function, Buncombe County determines the following criteria in regards to contracting:

- What the result is that the county actually wants to achieve
- Cost of service
- How to pay for the service (either using benchmarks with a flat fee or using a performance-based model).

Buncombe County has established procedures that trigger appropriate contract monitoring processes that it uses to monitor all of its service contracts. It was noted that there is a tendency to believe that performance-based contracting is the only way to assure that a contractor completes a task timely and efficiently. However, Buncombe County's experience has shown that understanding the desired results, calculating what it takes to get there, and effective training/monitoring can make benchmarked payment successful.

The county also has several pilot projects in place for job training, housing, fatherhood as well as programs for family support and substance abuse prevention. The pilots are part of the counties strategy to provide more intensive services to targeted populations. They are also a vehicle for the county to assist former TANF recipients to increase their earning potential. In addition, another strategy the county utilizes to provide increased services using minimal funding are the intensive services it provides "up front" to eliminate the need for cash assistance. This strategy is an example of how the county carries out its WorkFirst diversion goals.

Innovative use of funds, creative programming efforts, and effective partnerships, within a flexible State policy environment, have all contributed to Buncombe County's success in implementing welfare reform. For more information, visit the following web sites:

- North Carolina Division of Social Services: http://www.dhhs.state.nc.us/dss/
- WorkFirst Pilot Projects: http://ssw.unc.edu/workfirst/demos/index.html
- State of North Carolina: http://www.ncgov.com

7. COORDINATING WITH OTHER GOVERNMENTAL AGENCIES

This session of the workshop focused on how human service offices in counties as well as community-based organizations can coordinate and collaborate with other State and local government agencies. Programs available through housing and transportation agencies, along with suggested funding strategies, were discussed to assist counties in providing increased services for their TANF and low-income clients.

7.1 National Housing Issues: Timothy Harrison, Housing Policy Analyst, Center on Budget and Policy Priorities

Mr. Harrison began by providing an overview of the use of TANF and State MOE funds for Housing Programs. Housing assistance whether short-term or ongoing is allowable under the TANF program. The assistance must meet TANF's purpose one of "providing assistance to needy families, so that children may be cared for in their own home or in the home of a relative." Families with children or pregnant women that are "needy", as defined by each State's own definition of "needy", qualify for help.

He went on to point out that ongoing housing assistance lasting *more* than four months is considered assistance. This is in accordance with the TANF definition of assistance- "meeting ongoing basic needs for food, clothing, shelter, etc.". TANF or MOE funds may provide project-based rental assistance. Aid in this category has a time limit and other consequences if paid by TANF or commingled TANF and MOE funds. In regards to rental housing, Mr. Harrison noted that TANF funds may not be used for acquisition, construction, or major rehabilitation of rental housing.

Some of the implications for using TANF/MOE funds to provide on-going housing aid (over four months) were addressed next by Mr. Harrison. Use of TANF funds for this type of aid is allowable if a family is already receiving cash assistance. Some States fund their housing programs exclusively with TANF block grants. Others use State funds that the State counts towards it MOE obligation or a combination of TANF and MOE funds. The choice of which funding stream(s) to employ is closely related to the decision regarding which group(s) of families a State wishes to serve. States that wish to target families already receiving TANF-funded assistance can safely use TANF funds to provide housing assistance without affecting the families' future eligibility for TANF benefits under the Federal five-year time limit. States that wish to provide housing assistance to families that are *not* already receiving TANF-funded assistance, however, should consider funding the housing assistance with MOE funds that are accounted for separately from TANF funds. The months during which families receive benefits provided with such MOE funds do not count against the families Federal lifetime time-limit. By using MOE rather than TANF funds to serve these families, as a number of States with these programs are doing, States ensure that the families remain eligible for TANF-funded assistance should they need it at a later date.

States that wish to establish a housing assistance program that serves both families (those currently receiving TANF cash assistance and families that do not receive TANF cash aid) can create a housing program that combines use of Federal TANF funds for families currently receiving TANF cash aid with use of MOE funds for other families. By deploying funds in this manner, States can ensure the uninterrupted provision of housing assistance to working poor families that increase their earnings enough, so they no longer qualify for TANF cash aid. States can do this without jeopardizing these families' ability to receive TANF-funded cash at some future time if hardship should confront them (as in a recession, etc.).

In the last two years, six States and two counties in California have initiated programs that use TANF or State MOE funds to provide housing assistance to families attempting to make the transition from welfare to work. State welfare grants have always provided some assistance to meet housing-related costs. However, these new State initiatives do not seek to assist families generally with high housing costs. Instead, they use TANF or Moe funds to provide a significant amount of financial assistance to help meet the ongoing housing costs of a limited number of families. The new TANF or MOE-funded housing assistance programs in Connecticut, Maryland, Minnesota, New Jersey, North Carolina, and Los Angeles and San Mateo counties in California provide tenant-based housing vouchers that subsidize rents for housing for families who locate in the private market (not public housing). The programs range in size from about 75 families assisted annually in San Mateo County to 1,200 families assisted per year in Connecticut.

These modest programs are noteworthy because they demonstrate the growing recognition by State welfare policy makers that affordable housing--similar to child care and transportation--can be an important foundation of economic self-sufficiency that merits the expenditure of funds traditionally reserved for income maintenance and employment and training functions. Recent research results (notably one study by the Manpower Demonstration Research Corporation of the *Minnesota Family Investment Program* released in 1998) found that housing subsidies can be helpful in advancing welfare reform objectives. (For more information on this research study and the overall use of TANF and MOE funds for housing assistance, refer to the Center on Budget and Policy Priorities' publication *The Increasing Use of TANF and State Matching Funds to Provide Housing Assistance to Families Moving from Welfare to Work,* released in February 2000, written by Barbara Sard and Jeff Lubell.)

In terms of a summary, Mr. Harrison shared the following information to illustrate the effect that different types of TANF-funded assistance for a families' housing needs has on the family in light of the overall TANF program.

Consequences of TANF and MOE Funding Arrangements for a Housing Assistance Program

	Federal TANF funds or commingled with State MOE funds	State MOE funds in a *segregated* State program	State MOE funds in a *separate* State program
Federal 5-year time limit	Yes	No	No
Child support assignment	Yes	Yes	No
Share of child support retained by Federal government	No	No	No
Family counts for State work participation rate	Yes	Yes	No

Mr. Harrison next addressed the topic of funding homelessness prevention programs. This is one housing area in which non-assistance funds can be used under certain conditions with great benefits to the State/county. He clarified what the TANF final regulations say about these programs, shared national data on how States are funding homelessness programs, and offered some programming suggestions.

TANF requirements such as time limits, work participation, and child support assignment apply to any family receiving TANF assistance. Because assistance was generally thought to be broadly defined before the TANF final regulations were released, States and counties were reluctant to use Federal TANF funds for initiatives for working families so as to avoid triggering these requirements. When the TANF final regulations were issued, the definition of assistance was clarified. These regulations made it clear that homelessness prevention benefits are excluded from the definition of assistance (making them non-assistance) if the benefits meet the following three criteria:

- Benefits are designed to deal with a specific crisis situation or episode of need
- Benefits are provided on a one-time basis or for a prospective period that does not exceed four months
- Benefits are not intended to meet recurrent or ongoing needs

If families receive TANF-funded homelessness prevention benefits that are not considered assistance but do not receive *monthly* cash benefits, they are not subject to the sixty-month Federal time limit. In addition, they are not counted in the determination of the State's compliance with work participation requirements and are not required to assign their child support rights to the State.

Mr. Harrison next noted the implications of the TANF final regulations to States and counties regarding homelessness prevention programs. Within the established criteria, the regulations permit a broad array of homelessness prevention activities by States and counties. Some examples of non-assistance funded benefits that can be provided to families include payment for rent, mortgage, utility bills, first and last month's rent and security deposits, or one-time grants or loans for homeownership. States and counties can also provide emergency shelter and transitional housing (for up to four months). Services that help families prevent eviction or locate new housing also are considered non-assistance.

The clarified definition of assistance in the TANF final regulations allows States and counties the flexibility to use TANF funds to help needy families that are *not* receiving monthly cash welfare benefits, in addition to helping their regular TANF caseloads. States and counties can set financial eligibility levels for TANF-funded homelessness prevention programs that are higher than the eligibility levels for TANF assistance. Other strategies discussed included expanding existing, or establishing a new, emergency assistance program; including housing needs in a diversion program; or the funding of a homelessness prevention program outside of the State or county's basic welfare program. The following table summarizes how States (as of June 1999) provided housing-related benefits as part of their TANF programs to families in situations that met State-established emergency criteria.

Homelessness Prevention Benefits Provided Under State TANF Programs (as of 6/99)

Types of families served	Total number of States	Prevent eviction	Short-term rental assistance	Prevent utility shut-off	Emergency housing assistance	Temporary shelter
TANF monthly recipients	31	27	14	23	28	22
Eligible for but not receiving TANF-BCA	28	24	11	22	25	20
Not eligible for TANF-BCA	25	20	10	17	18	17

Another important implication of the TANF final regulations is the increased opportunity available for States and counties to partner with community organizations to provide homelessness programs. This is because it eliminated the assumed need to collect or report data on individual families receiving TANF-funded non-assistance. Removing this extra work makes it much easier for States and counties to contract with community agencies to run homelessness prevention programs.

(For more information on use of TANF funds to prevent homelessness, refer to the Center on Budget and Policy Priorities' publication *Using TANF Funds for Housing-Related Benefits to Prevent Homelessness*, released in April 2001, written by Barbara Sard. See the *References* section at the end of this report.)

7.2 State Housing Programs: Tracy D'Alano, Manager, Supportive Housing and Homeless Programs, Colorado Department of Human Services

Supportive Housing and Homeless Programs (SHHP) is the housing agency for the Colorado Department of Human Services that provides basic housing services to agencies all over the State that serve special needs populations. The agency has staff with extensive expertise in housing persons with disabilities, homeless, and single parent families. In addition, the agency administers over 2,000 units of subsidized housing for persons with disabilities and low-income families in partnership with over sixty non-profit local human service agencies in the State.

Ms. D'Alano emphasized to the group that welfare reform and affordable housing go hand-in-hand. She referenced a report published by the Colorado Fiscal Policy Institute that said families in Colorado are spending the greatest percentage of their monthly income on housing and child care. Despite the fact that welfare and housing assistance are designed and administered by the State separately, the beneficiaries significantly overlap. She stressed that housing is not an entitlement and there are many more eligible families than the actual number of families provided assistance. In Colorado, approximately 26.2% of TANF families currently receive housing assistance. This figure is despite the fact that families receiving TANF assistance or working at low paying jobs are unlikely to be able to rent housing on their own without paying a significant portion of their incomes toward rent.

Ms. D'Alano shared with the group some financial figures that supported the need for assisted housing for both employed and unemployed single mothers. In general, a person who works forty hours a week at the minimum wage of $5.15/hour brings home approximately $760 per month after taxes. Using several different scenarios, she demonstrated that this income is inadequate for a single mother of two children under six years old who lives anywhere in the State. The figures used included food stamps and subsidized child care as part of the person's income. The rent assumed was $702/month for a two bedroom, one bath apartment. Using the same figures, she further demonstrated that the same mother could not afford her rent either if she was not working but receiving TANF assistance. Ms. D'Alano went on to reinforce much of what was discussed previously during the workshop in regards to using TANF funds for housing assistance. She also pointed out that housing subsidies help families obtain and retain employment by stabilizing their lives and freeing up other funds in a family's budget to pay for other work-related expenses such as child care and transportation.

Ms. D'Alano offered some suggestions regarding ways county TANF offices can coordinate with other governmental agencies to support the housing needs of their clients. Local public housing authorities can be collaborated with in order to share grant applications and obtain better access to existing housing programs. Local governments and State agencies are another partner that TANF agencies can consolidate plans with and obtain access to other funds, such as emergency shelter grant programs, for their clients.

One program that offers local TANF offices a great deal of support for housing is the Federal Housing and Urban Development's (HUD) *Welfare to Work* Program. This program is a rental assistance and services program sponsored by HUD to assist families as they move towards self-sufficiency. It is funded by the Section 8 voucher program, a permanent Federal assistance housing program, and targets TANF eligible families living in transitional housing. Over 160 vouchers have been administered through fifteen contracted agencies throughout Colorado. Within the State of Colorado, the Colorado Springs and Jefferson County Housing Authorities are administering local Welfare to Work housing programs.

Ms. D'Alano completed her presentation by mentioning programs around the State that are using TANF funds for housing assistance. Denver County offers emergency assistance. Larimer County uses TANF funds in its welfare diversion program. The Fort Collins Housing Authority has a memorandum of understanding (MOU) with Larimer County's social service office in support of this initiative. Adams County has also developed supportive relationships with a housing authority there on behalf of two homeless shelters it operates.

7.3 Local Transportation: Erlinda Gonzales, Director, Archuleta County (Colorado) Department of Social Services

Archuleta County is a large rural county with isolated communities and rugged terrain separating them. The county has no affordable public transportation for TANF, low-income, unemployed, and individuals with disabilities. Transportation, or lack of, has been the county's TANF population's long-standing greatest barrier to employment for years. The county's response to this challenge offers an excellent example of the use of both TANF assistance and non-assistance funds for transportation.

Three years ago the county was considering how to expand an existing small transportation program for senior citizens. TANF funds were one source of funding the county considered. It also applied and was awarded a Federal Transit Administration Job Access/Reverse Commute (JARC) transportation grant. The application process was a success due largely to the efforts by the county to research appropriate routes, survey for public support, and partner with key stakeholders throughout the community. Archuletta County qualified for funding based on its grant application and received a grant for $35,000. The county used TANF funds, *Employment First* program funds, and separate county funds to provide the match required for the grant. Other contributing organizations also committed start-up funds for the project. Funding was available as follows:

- TANF- $67,000
- Arhuleta County- $47,572

- Job Access Grant- $35,000
- Employment First- $5,000
- Welfare to Work- $5,000
- Town of Pagosa Springs- $3,000
- United Way- $2,500
- Business donations $2,000

Today the county has a fixed route bus service that covers thirty miles, runs from 6:30 a.m. to 8:00 p.m., and averages 179 rides per week. Additional transportation services now available include a meal delivery service and medical shuttles locally and to a nearby town. Future improvements planned are the purchase of an additional vehicle, an increased number of stops, and improved safety and accessibility for riders.

The county was able to use TANF funds for this project due to the definition of assistance provided in the TANF final regulations. Under this definition, supportive services such as transportation to non-employed families, are considered assistance. If the family falls into one of the seven exclusions from assistance (see section 5.1 of this report), and based on the families' circumstances, non-assistance funding may be used. The first exclusion (part iii) that applies for families in this project occurs when the family becomes employed. The other applicable exclusion (part vii) occurs because transportation benefits provided under a Job Access or Reverse Commute project to an individual who is not otherwise receiving assistance are also excluded from the definition of assistance.

8. PARTNERING WITH NON-PROFIT ORGANIZATIONS

This session of the workshop addressed programs and strategies for partnering with non-profit organizations. Mark Greenberg (senior staff attorney, CLASP) opened the session with introductory comments.

Collaborations between community organizations such as community development corporations (CDCs) and TANF initiatives have become more commonplace in recent years. Neighborhood organizations regularly seek to link local residents with employment opportunities created by small businesses located in a CDC's target area. Increasingly, community groups are finding ways to develop networking relationships with major employers and institutions in the regional economy.
Programs operated by the U.S. Department of Health and Human Services have been an important catalyst in nurturing productive partnerships between traditional TANF-funded agencies and CDCs (as well as other community based organizations such as community action agencies). The main Federal source for CDC venture funding is the national grant program known as the Urban and Rural Community and Economic Discretionary Grants Program operated by the HHS Office of Community Services. This grant competition requires project proponents to build sustained relationships with local TANF service providers. As a result, hundreds of CDCs promoting job-creating initiatives rely on TANF partners to assist low-income residents and entrepreneurs with essential services required to make new workers contributors to the economic revitalization of their communities.

Community Development Corporations (CDCs) can play a key role in the design and implementation of effective welfare reform programs. In some areas, community coalitions are being formed to help assess a community's needs and resources and advise governing bodies on welfare reform plans. In other areas, coalitions have decision-making authority. Communities are employing a range of models to get service providers, non-profit organizations, employers, schools, welfare recipients and other stakeholders involved in local implementation of welfare reform. CDCs can be locally organized and locally controlled as a 501c3 organization to receive funding from grants, foundations, and government agencies to meet the needs of their community. One of many recommended guides is *Building Communities from the Inside Out: A Path Toward Finding and Mobilizing a Community's Assets* by John L. McKnight.

The TANF funding guide, *Helping Families Achieve Self-Sufficiency- A Guide on Funding Services for Children and Families through the TANF Program*, also promotes partnering with non-profit organizations to more effectively serve TANF clients. Among the important areas suggested for states and communities to address is the development of "collaborative linkages among employers, local leaders…and non-profit community groups… to create jobs, support work, and make low-income neighborhoods more viable."

(For additional information, refer to the February 2000 Office of Community Services funded publication *Building Partnerships Between State TANF Initiatives and CDCs - A Guidebook for Practitioners and State Officials* written by Marcus Weiss, Economic Development Assistance Consortium, and Kevin Kelly, National Congress for Community Economic Development)

8.1 Midwest Minnesota Community Development Corporation: Kathy Carney, CEO, Teamworks, Inc.

The Midwest Minnesota Community Development Corporation (MMCDC) is a non-profit, low-income community organization that helps to rebuild distressed rural communities through capital investment and lending, creation of jobs, development of housing, and technical assistance efforts. MMCDC's primary strategy is to invest in a wealth of producing activities that also create employment opportunities. Under this strategy, MMCDC has financed over 200 homes and created nearly 800 jobs through eleven projects.

Ms. Carney reflected that CDCs typically reflect the communities in which they operate and each one is unique to its area. They typically know the business needs of their communities and form strong business partnerships with local employers. MMCDC focuses on community development, economic development, business development, and personal development through job training and housing assistance. Through its technical assistance efforts, MMCDC assists other CDCs in the development of their business plans. In response to the need for higher skilled workers demanded by technology-driven companies, MMCDC developed the training company Teamworks, Inc.

8.2 The Enterprise Foundation: Karen Lado, Denver Office Director

Karen Lado is the Denver Office Director for The Enterprise Foundation, a national, nonprofit housing and community development organization. Enterprise works with community-based organizations to provide affordable housing and access to jobs and child care for low-income people.

As a means to encourage availability of housing to low-income families in the Denver area, technical assistance as well as grant and loan support are provided to developers of affordable non-profit housing. The other area in which the Enterprise Foundation works to provide access to jobs for low-income families is by partnering with employers and training providers. Pilot training programs and support for a network of employment and training providers is another initiative underway by the Enterprise Foundation in Denver.

One example of a potential use of non-assistance TANF funding that Ms. Lado shared with the group was the Enterprise Foundation's work on an individual development account (IDA) program in the greater Denver area. IDAs are a matched savings program that allows low-income working families to accumulate assets for first time homeownership, post-secondary education, and business capitalization. The program is called the *Savings Plus IDA Program*.

Under the TANF final regulations, contributions to and distributions from IDAs are considered excluded from the definition of assistance. This means they do not influence eligibility of families for Federal assistance. Although TANF funds can be contributed to IDAs, as part of the savings match or administrative costs, there are currently no TANF funds contributing to this local program. The Colorado Department of Human Services is currently working with the Enterprise Foundation and Mile High United Way to map out a plan for using TANF funds. The program's largest funding source is currently from a grant under the *Assets for Independence Act* (Office of Community Services).

Eligible participants must be at or below 200% of the Federal poverty level and their savings are matched at a rate of 3:1. The Foundation has partnerships with Mile High United Way, Del Norte NDC, Rocky Mountain Mutual Housing and a network of fifty referral and support agencies. Despite these partnerships, there is still a need for additional community organizations to contribute matching funds and expanded financial literacy and homeownership training. To date, there are seventy matched savings accounts open and participants have purchased seventeen homes.

The second example shared by Ms. Lado could be considered a potential use of non-assistance funds (under the TANF final regulations) as it relates to transitional services, job retention, job advancement, and other employment-related services that do not provide basic income support. The Rocky Mountain Mutual Housing Technology Center is located in affordable rental properties and is open to residents and neighbors. Some of the services provided for those seeking a technology-based job include training in software applications, Web page design, and Internet use. Help with resume preparation, job searches, and homework are also available.

The last example Ms. Lado described could also be considered a potential use of non-assistance funds for the same reasons as in the above example. The Rocky Mountain Mental Health Association operates a *Health Care Training Program* that provides six weeks of pre-placement training customized to the health care industry. Participants are provided 12 weeks of paid internship with health care organizations, placement assistance, and one year of post-employment support. One of the unique features of this program is the partnership with the city of Denver, community-based organizations, the Community College of Denver, and local area employers. The Enterprise Foundation is currently exploring contracting with a local hospital. The challenges of this program are the need for coordination among partners, the need for career ladders (health care jobs generally provide low hourly rates), and the difficulties associated with serving the working poor.

8.3 General Discussion: Partnering with Non-Profit Organizations

A general discussion ensued following Ms. Lado's presentation. Below are highlights of these discussions.

Sonoma County California has a large number of partnerships with community-based organizations. For example, they offer post-employment services that are available for clients at flexible hours in order to accommodate families' work schedules. The service requires a large number of staff members in order for it to be successful. This is an example of a service that is of great need to the community but would not be available without the support of community organizations.

Buncombe County North Carolina has also formed a large number of partnerships with community-based organizations. The county has a large percentage of faith-based organizations that it partners and contracts with for services (such as case management.) The county has also contracted with a local hospital to provide assistance to WorkFirst participants. TANF non-assistance funding pays for job retention, advancement, child care and other employment related services.

A brief discussion ensued about contracting strategies for community-based organizations. In Buncombe County North Carolina, as well as in Minnesota, performance-based contracting is used. The payment method for these organizations is based on outcomes. This is risky for non-profit organizations as they usually have to use their own operating funds at the onset of any program. In Sonoma County California, contracting with community-based organizations is established by a cost-basis.

One suggestion made was to partner with employers in working with non-profit organizations. TANF funds could be used to pay for child care, transportation, and other employment related needs. It was pointed out that the Office of Community Services provides funding for community development corporations to invest in businesses that promote economic and community development by hiring TANF recipients. Employers that receive funds must agree to hire TANF clients. Other incentive programs are available for businesses such as the new market tax credit and enterprise zones. A final related comment made by a participant was that TANF funds can also be used for economic planning.

Many community development corporations in Colorado are housing-based. They focus on neighborhood development and economic development and are operated by a local planning board. A list of CDCs in Colorado, and other States, and other related information is available at the National Congress for Community Economic Development at www.ncced.org.

9. EMPLOYERS AND EDUCATORS AS PARTNERS

This session focused on partnering with employers and educators to offer services to TANF recipients and low-income individuals. A community-based organization and a community college presented.

9.1 Teamworks, Inc., Park Rapids, Minnesota: Kathy Carney, CEO

Teamworks was created out of the need for skilled workers in technology jobs in one community in Minnesota. This training and employment company was developed by the Midwest Minnesota Community Development Corporation (MMCDC).

Teamworks mission statement is to "Create Wealth for Businesses and Individuals through Asset Development." Its desire is to meet the needs of people who, for whatever reason, graduate from high school but do not go to college or get marketable skills. Ms. Carney reflected that, on average, over 70% of high school students do not complete college. This mandates an important demand for skills training for certain jobs. Having both a business and social mission, they strive to create assets for business through the development of human capital and for individuals through the development of intellectual and personal capital.

The manufacturing focus of Teamworks, Inc., is to offer competitive wages, good benefits, career mobility, retirement programs, high technical skills, and industry growth. Clients are recruited, assessed as to their learning needs and abilities, and then trained. As part of the training package, the clients receive much more than technical skills. Communication/Team Building, work ethics, behavioral skills, and ergonomics training are some of the areas covered. In return for their investment in Teamworks, businesses receive a fully trained employee who has been assessed to be placed as the "right person for the right job," and who has committed to stay on the job for a minimum of nine months. Employees who leave before the nine months are up, are responsible to pay back the remaining amount of money that an employer originally invested in them. Graduates of Teamworks training programs are also provided with job retention and advancement services.

Businesses are also asked to make a commitment to the employee in intellectual resources, training costs, support while in training, equipment and continuous improvement.

The revenue sources contributing to Teamworks include:

- Employer Investment (over 70% of revenue is from private sources)
- State Investment (Local Intervention Grant-TANF, Minnesota Dept. of Trade/Economic Development, and *Workforce Investment Act* grant)
- Federal Investment (currently none)
- Foundations (Mcknight Foundation and other private foundations)

Key to the success of the program is an on-going communication with the employers to follow up on the employee's performance and to listen to and act on the employer's needs. There is a need to document the value of the employee to the employer in "hard cash" or return on investment. Potential employers must be able to document the retention and efficiency contributions of employees (in dollar value) by measuring their performance on the job. This will sell the program and employees to businesses. Other advice Ms. Carney suggested was for community organizations to work closely with local businesses to identify business needs and employee skill deficiencies in the local economy. This information can then be used to plan appropriate training for potential and existing employees.

9.2 Community College of Denver: Elaine Baker, Director of Workforce Initiatives

Elaine Baker, Director of Workforce Initiatives for the Community College of Denver presented an overview of their *Essential Skills Program*. This program takes people who, in many cases, do not have a high school diploma or GED and trains them in essential job skills. Students begin with a one-month Job Readiness and Vocational Training course. They then move to 24 hours/week of internship plus 15 hours /week of vocational training, followed by a job search and employment. Work ethics are also modeled into the program. This program has a strong follow-up with employers and employees to mediate problems and needs. Consequently the percentages of success in program completion, job placement and retention have increased. The targeted types of jobs have minimum entry-level requirements with plenty of room available for advancement. Graduates of the program enter child care, banking, and computer technician jobs.

Ms. Baker shared some of her research findings she observed while working on a study that compared the experiences of the college's students who received TANF assistance funding to those of students who received TANF non-assistance funding. Currently, she noted that her office has observed that there is a greater success ratio in students receiving assistance, or services funded by assistance funds, as compared to students who receive services via non-assistance funds. She attributes their success to the fact that they have the advantage of accountability and a support system. The college is currently working on solutions to increase the retention and employment success of students whom are non-assistance clients.

10. SUPPORTING TANF PARTICIPANTS--BEGINNING TO END

This session focused on strategies to provide services to families before they become TANF-eligible. Many times families come into the county welfare office with immediate needs that must be addressed. In general, these needs could be addressed by non-assistance funding because the family has not been determined to be eligible for TANF. Emergency services are sometimes required to address a family's immediate needs, such as a family's child care, transportation, housing, domestic violence or other types of needs, during the TANF eligibility waiting period. In Colorado, this waiting period is typically 30-45 days.

A preliminary discussion about this pre-eligibility period ensued because some county representatives felt that welfare diversion funds (regular assistance) could be used to meet these basic needs. In response, the Colorado Works program offered to distribute a memorandum on how counties can fund these needs. The suggested method for counties to receive more information on this was to discuss this in a future monthly county teleconference. After further discussion by the full group, it was agreed that these services would be considered "transitional services" and therefore non-assistance when defined in a contract for services.

The other aspect of this session featured programs that support purposes three and four of the TANF program: pregnancy prevention and promoting two parent families. This is an area where more flexibility in service delivery using non-assistance funds is possible. It is also a fairly new arena for most county TANF staffs because it involves dealing with families on a more personal one-on-one basis. Relationship building and handling personal interactions represent an entirely different focus for most TANF caseworkers. In the earlier years of TANF, there was much talk of a required culture change. Welfare offices shifted the focus of their workers' efforts from eligibility and intake-oriented tasks to more broadly defined efforts that involve job counseling and career coaching activities. TANF clients with hard-to-serve issues of substance abuse, domestic violence, and learning or physically disabled challenges represented an even greater need for counseling by TANF caseworkers. Addressing TANF purposes three and four more effectively in the future will mean caseworkers will again have to adjust to a larger role as family and relationship counselors. The programs featured in this session highlight local programs that address relationship building and mentoring.

10.1 Friends First, Longmont, Colorado: Lisa Rue, President

Lisa Rue, President of Friends First, Inc., Longmont Colorado talked about their program's "Commitment to Teaching Teens about Healthy Relationships."

Ms. Rue began by suggesting that organizations such as hers offer a tremendous opportunity for a use of TANF funds to prevent out-of-wedlock teen pregnancies. She provided the group with a brief background of problems relating to teen sexual activity and out-of-wedlock births.

- Birth rates have decreased since 1990 by 12.7%
- Boulder County has decreased by 20.8% from 1990-1997
- 78% of births to teen mothers occur outside of marriage, up from 15% in 1960
- Hispanic teen birth rates are increasing
- Between 1991-95, women diagnosed with AIDS increased by 63%
- Teens are more likely to be infected by STD's than adults because their reproductive organs are not fully developed
- The condom is ineffective in reducing the transmission of HPV
- In all parts of the world, infections with genital HPV's appear to account for nearly 100% of the cervical cancer.

In relationship to the TANF mandates (to end the dependence of needy parents by promoting job preparation, work and marriage; to prevent and reduce out-of-wedlock pregnancies; and to encourage the formation and maintenance of two parent families), this program approaches these problems in a two-fold manner. The first is through the training curricula, *WAIT* training and *Loving Well*, designed to teach teens how to build quality relationships which are not based on sex. *WAIT* training, developed by Friends First, trains teachers and speakers how to teach healthy relationship education and is currently being taught in 31 states. The second approach is through peer support, which often reaches teens in a way not accessible to teachers and outside speakers. Ms. Rue summarized some of the community benefits of this program.

Friends First Abstinence Curriculum Program
Benefits to the Entire Community

Benefits to Students

- Relevant to what teens say they want to learn about sex and relationships
- Increases positive peer pressure with a program that has been tested for five years
- Provides positive role models from the community

Benefits to Parents

- Increase parental involvement
- Parent education seminars

Benefits to Teachers

- Increased teacher training and resources
- Better behavior and performance through character development

Benefits to School Districts and Social Service Agencies

- Implements the best primary prevention strategies that are outlined in literature
- Strategically pinpoints the transitional stages where kids are most likely to take risks
- More cost effective to prevent the problem before it starts

10.2 Boulder County *Project Work Together* (Mentoring Program): Tessa Davis, Mentor Program Coordinator, Boulder County Community Services Department

Tessa Davis, Mentor Program Coordinator representing the Boulder County Department of Social Services, discussed *Project Work Together*. This is a one-on-one mentoring program that is voluntary for the TANF clients. Designed to create relationships outside of the "system", it provides support, guidance and encouragement to families moving from welfare to work.

Volunteers can choose to be *Job Mentors* or *Family Support Mentors*. *Job Mentors* help the new employee master job skills, coach in areas such as teamwork and work habits, and give constructive feedback and positive reinforcement. *Family Support Mentors* assist families in dealing with day-to-day challenges, provide role modeling and build a trusting relationship.

There are four key ingredients to this mentoring program being successful:

1. Communication and good working relationships with case workers (business community cooperation supports this also)
2. Recruitment – a good pool of volunteers. (Program exposure is through local newspapers, faith-based organizations, word of mouth and web sites.)
3. Training and support for the volunteer mentors
4. Having a good balance between being "outside of the system," but still being connected with TANF and the case workers

An evaluation of the program was recently conducted. Surveys were sent out to both clients and volunteer mentors. Ms. Davis shared the following data from the evaluation *Project Work Together* conducted.

- 96 evaluations were sent out
- 61% of clients responded
- 20% of volunteer mentors responded
- 50% of clients said they would stay in touch with their volunteer mentor
- 100% of clients said they would recommend the program to a friend
- 56% of clients said they would like to become a volunteer mentor

An interesting outcome of evaluations of the success of the program is that clients rated it very successful, while the mentors often felt they had not been very effective in helping the client. The overall goal of this organization is to help clients feel more positive and hopeful about the future and more connected with their community.

11. FINAL REMARKS

This workshop brought together a diverse group of Federal, State, and county representatives to consider a difficult, and sometimes confusing, topic- use of TANF non-assistance funds. One participant summed up the theme for the workshop by reflecting that, "The issue is not the most *creative* or *innovative* way to spend funds. The issue is the *best* use of funds. It may be that the best use is on some fairly traditional uses." Participants were encouraged to visit the TANF final regulations, the DHHS TANF funding guide along with the TANF policy questions page on the Office of Family Assistance web site (see the next section *References*), and their appropriate State or county TANF office for further information. The Colorado Works Program will continue to support counties with technical assistance on this topic and other areas related to TANF implementation in the future.

For more information on this workshop, contact Tim Cox at (303) 866-2882 or Tim.Cox@state.co.us. For questions concerning the Welfare Peer Technical Assistance Network, contact Blake Austensen at (301) 270-0841, ext 215, or e-mail baustensen@afyainc.com. More welfare related information is available on the Welfare Peer Technical Assistance Network web site at www.calib.com/peerta.

References for Additional Information

Barbara Sard, *The Use of TANF Funds to Provide Housing and Homelessness Assistance: Implications of the Final TANF Rules*, Center on Budget and Public Policy Priorities, August 1999, http://www.cbpp.org/8-13-99hous.htm.

Barbara Sard, Jeff Lubell, *Outline of How Federal Housing Programs Can Help Provide Employment and Training Opportunities and Support Services to Current and Former Welfare Recipients,* Center on budget and Policy Priorities, January 2000, http://www.cbpp.org/1-6-00hous.htm.

Barbara Sard, Jeff Lubell, *The Increasing Use of TANF and State Matching Funds to Provide Housing Assistance to Families Moving from Welfare to Work*, Center on budget and Policy Priorities, February 2000, http://www.cbpp.org/1-6-00hous.htm

Barbara Sard, *Using TANF Funds for Housing Related Benefits to Prevent Homelessness,* Center on Budget and Policy Priorities, April 2001, http://www.cbpp.org/4-3-01TANF.htm.

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John McKnight and John Kretzmann, *Building Communities from the Inside Out: A Path Toward Finding and Mobilizing A Community's Assets*, 1993, ACTA Publications 4848 North Clark Street, Chicago, IL; available by calling 1-800-397-0079.

Mark Greenberg, Steve Savner, *The Final TANF Regulations: A Preliminary Analysis,* Center for Law and Social Policy, May 1999. http://www.clasp.org/pubs/TANF/finalregs.html.

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Mark Greenberg, *The TANF Maintenance of Effort Requirement*, Center for Law and Social Policy, June 1999, http://www.clasp.ogr/TANF/moerev.htm.

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Office of Family Assistance, Administration for Children and Families, U.S. Department of Health and Human Services, *Final Rule—The TANF Program, Federal Register*, April 1999, vol. 64, no. 69, http://www.acf.dhhs.gov/programs/ofa.

Office of Family Assistance, Administration for Children and Families, U.S. Department of Health and Human Services, *TANF Program Policy Questions*, http://www.acf.dhhs.gov/programs/ofa.polquest/index.htm.

Office of Community Services, Administration for Children and Families, U.S. Department of Health and Human Services, *Building Partnerships Between State TANF Initiatives and CDS- A Guidebook for Practitioners and State Officials*, Marcus Weiss: Economic Development Consortium and Kevin Kelly: Economic Development Assistance Consortium, February 2000.

State Policy Documentation Project, a joint project of the Center on Budget and Policy Priorities and the Center for Law and Social Policy, http://www.spdp.org.

Helpful Web Sites

Office of Family Assistance: www.acf.dhhs.gov
Office of Community Service: www.acf.dhhs.gov
Enterprise Foundation: www.enterprisefoundation.org
National Association of Counties: www.naco.org
Center for Law and Social Policy: www.clasp.org
Center on Budget and Policy Priorities: www.cbpp.org
U.S Department of Housing and Urban Development: www.hud.gov
U.S. Department of Labor: www.doleta.gov
U.S. Department of Transportation: www.dot.gov
State and Local Government on the Net: www.piperinfo.com/state/states.htm
Welfare Peer Technical Assistance Network: www.calib.com/peerta
Welfare Information Network: www.welfareinfo.org

Appendix A

WORKSHOP AGENDA

AGENDA

Colorado Department of Human Services

Use of TANF Non-Assistance Funds: Models and Strategies

Hilton Denver Tech Center - South
I-25 and Orchard Rd.
Denver, Colorado

March 13-14, 2001

Tuesday, March 13

8:00 a.m. – 9:00 a.m.	**Registration—Hotel Lobby**
9:00 a.m. – 9:15 a.m. *(Monarch Room—Main Level)*	**Welcome and Introductions---Workshop Overview** *Beverly Turnbo, Federal Region VIII Administrator, Administration for Children and Families* *Danelle Young, Manager, Office of Self-Sufficiency, Colorado Department of Human Services*
9:15 a.m. – 10:30 a.m.	**National Perspective: Use of TANF Non-Assistance Funds** *Mack Storrs, Senior Program Specialist, Office of Family Assistance, Administration for Children and Families, Central Office* *Mark Greenberg, Senior Staff Attorney, Center for Law and Social Policy (CLASP)* *Kevin Richards, Colorado Works Manager, Colorado Department of Human Services*
10:30 a.m. – 10:45 a.m.	**Break**
10:45 a.m. – 12:00 p.m.	**Program Strategies: The Realm of Possibilities** *Jerry Dunn, Director, Workforce Investment Board, Sonoma County, California* *Jim Holland, Contract Manager, Buncombe County, North Carolina*
12:00 p.m. – 1:15 p.m.	**Lunch (Aspen Room—downstairs)** An opportunity to network with the speaker/program of your choice.
1:15 p.m. – 2:45 p.m.	**Coordinating with Other Governmental Agencies** *National Housing Issues: Timothy Harrison Ph.D., Housing Policy Analyst, Center on Budget and Policy Priorities* *State Housing Programs: Tracy D'Alano, Manager, Supportive Housing and Homeless Programs, Colorado Department of Human Services*

	Local Transportation: Erlinda Gonzales, Director, Archuleta County. Department of Social Services, Colorado
2:45 p.m. – 3:00 p.m.	**Break**
3:00 p.m. – 4:30 p.m.	**Partnering with Non-Profit Organizations-PANEL** **Moderator:** *Mark Greenberg, CLASP* *Kathy Carney, CEO, Teamworks, Inc., Midwest Minnesota Community Development Corporation* *Karen Lado, Denver Office Director, The Enterprise Foundation* *Jerry Dunn, Director, Workforce Investment Board, Sonoma County, California* *Jim Holland, Contract Manager, Buncombe County, North Carolina*
4:30 p.m.	**Wrap-Up/Adjourn** (Announcement: You are invited to an optional 6:00 pm Dinner for speakers & attendees in reserved space at the Flat Irons Bar & Grill in the atrium. Order from the menu on your own.)

Wed. March 14

7:00 a.m. – 8:15 a.m.	**Breakfast**
8:15 a.m. – 9:45 a.m.	**Employers and Educators as Partners** *Kathy Carney, CEO-Teamworks, Inc., Park Rapids, Minnesota* *Elaine Baker, Director of Workforce Initiatives, Community College of Denver*
9:45 a.m. – 10:00 a.m.	**Break**
10:00 a.m. – 11:30 a.m.	**Supporting TANF Participants – Beginning to End** (Open forum on supporting participants during pre-TANF eligibility periods.) *Lisa Rue, President-Friends First, Longmont, Colorado* *Tessa Davis, Mentor Program Coordinator, Boulder County Department of Community Services*
11:30 a.m. – 12:15 p.m.	**Working Lunch**

	Next Steps for Counties / Lessons Learned (Small group breakout sessions with speakers or moderator at each table.) 1-List ideas liked best. (from day 1 handout) 2- Choose 1 or 2 you want to implement in your county. 3- Do you have the resources/info to do it? How can we help? (fill out request card)
12:15 p.m. – 12:30 p.m.	**Workshop Wrap-up and Evaluation** (turn in form from your folder)

Appendix B

WORKSHOP PARTICIPANT LIST

Participant List
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Using TANF Non-Assistance Funds: Models and Strategies

March 13-14, 2001

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