

Family Services Review Commission Meeting

August 2, 2007

HSB-252

Members present: Maggie Bagon, Jessica Chanay, Diane Cohen-Alpert, Kim Freeman, Shirley Kaping, Peggy Kennerly (VCON), Rosemary Lazzari, Mavel Morales, Rob Potter, Angela Sanchez, and Michael Ware

Members excused: Doreen Binder

Members absent: Bonnie Davidson and Miranda Herrera

DHS staff present: Mickey Serice, Vic Todd, and Nancy Sathrum

Administrative Handouts, sent via email prior to the meeting: Meeting Agenda, Draft Minutes of the June 7, 2007 FSRC Meeting, DHS Summary of Complaints Report for May and June 2007

Additional Administrative Handouts at meeting: May 2007 and June 2007 CAF Public Assistance Caseload Statistics (2nd Edition), Self-Sufficiency at a Glance for May 2007 and June 2007, Amended FFY 2007 State TANF Plan

Greeting and Roll Call:

Meeting called to order at 8:42 a.m. with a membership quorum in attendance. Introductions were made around the table. Peggy Kennerly participated by video conference.

Chair Report:

- Action and follow-up items: No follow-up needed.
- Approval of Minutes:
 - Page 3; Jessica asked what APSHA stands for. American Public Human Services Association. Dr. Goldberg is a chair for one of their groups and Ramona works closely with the child welfare group. Other DHS staff also hold chair positions with APHSA. Jessica asked if they make recommendations on the current TANF Reauthorization process. Mickey didn't think they would make direct recommendations on TANF.
 - Shirley Kaping motioned and Michael Ware seconded the approval of the June 7, 2007 FSRC meeting minutes as written. Vote of approval was unanimous.
 - Rob will be out of state next month; the co-chairs of the Policy Committee (Rosemary and Jessica) will assume responsibility for getting the agenda out and running the September meeting.
- Commission membership status: Report from Jessica and Mavel on work of Ad Hoc committee.
 - Diane knows a person from the Salem area from the Bank of America that may be interested in joining the Commission. He participates in other human services

- groups. She will provide further information to the Ad Hoc committee for their review.
- There has been no recent report from the Governor's Office. Mavel asked if we have applications in process. The only two that Nancy is aware of are the two Oregon Law Center staff which they are holding until the Commission is full. Shirley said that either of the two applicants from the Oregon Law Center could be assigned in the Advocate category.
 - It may be advantageous to have more business partners at the table since working collaboratively with them often allows issues to move forward at a quicker pace."

CAF Report, Mickey Serice and Vic Todd:
TANF Reauthorization

Final version of TANF Bill: Nancy sent the final bill electronically to commission members on July 17, 2007. Added text is in **bold** print and removed text is in *italics*.

Vic introduced Patrick Ring and Xochitl Esparza, policy analysts with CAF Self-Sufficiency Programs (SSP).

Handouts provided by Vic: 1) TANF and JOBS Program Redesign Summary and Draft Enhanced Program Elements (to be used as a reference document, 2) TANF time limit update, 3) TANF/JOBS Program Disqualification Review, and 4) Side by Side USDA Proposal and House Bill comparison.

TANF enhancements will become effective October 2007.

Additional positions: We will be adding 16 positions (MSW level, non case-carrying consultants) to assist case managers with clients who present multiple barriers. A draft position description has been written; however, the classification of these positions has not yet been determined, but we continue working on this with Human Resources. The policy and position descriptions should address cultural competency and alternate language needs. The design of staff distribution is still being discussed. The expanded Family Support and Connections (FS&C) will also help address our high barrier clients. We hope these additions will be a good connection for clients that are at risk for entering Child Welfare.

ACTION: Jessica asked for follow-up on these positions at the September meeting.

Community partners will also be affected. We want community partners' input so we can successfully measure how we're doing. This morning Dave is discussing additional outcome measures with the JOBS Workforce meeting. **ACTION:** Kim requested that Dave bring recommendations for partners to the September meeting.

10 Accuracy Summits are being held around the state this summer. One day is centered on the new TANF bill to give case managers, line managers and partners a perspective of what

is happening and why. Partners are invited to the second day so they receive training also. Further training will take place in the fall.

Additional information on what was needed for TANF reauthorization was provided to the Legislature late in the session. After review, the additional positions and the FS&C program increases were funded.

The FSRC asked Vic to continue to share information (white papers) on TANF redesign as they become available. **ACTION:** Vic/Dave please provide to Nancy as available so she can send out information electronically.

Time limits update: Recent legislation put us more in line with the old waiver.

- Oregon has its own time limit policy, which is similar to the federal limit, but for most hardship cases, stops the clock instead of extending the clock for TANF families. Before and after the federal 5-year limit is reached, exclusions will be granted through the state program. Oregon will report to the federal government based on the federal criteria, utilizing the allowed 20 percent hardship criteria.
- Pre-SSI changes the dynamics in a big way. It allows us to continue to provide benefits to this population in different ways.
- Partners may also meet performance measures under the new program. As a contractor, Michael Ware believes this will support partner participation. Outcomes should help strengthen client families as they move forward. Diane mentioned that this is the first time she really likes her contract's statement of work. She thinks it better reflects the job and the work they are doing with clients. There are many positive things happening during the reauthorization.
- TANF time limits letters are sent to clients at 42 months. A new letter will be sent out with the new provisions. **ACTION:** Send new time limits letter to FSRC.

SSI and SSDI: We currently have 7 disability analysts statewide. Funding was approved to add 8 disability analysts and 8 support positions (Administrative Specialist 1). The current liaison positions who work with clients will be retained. None of the positions will be doing the hearings. Various local programs throughout the state and country have a 75-90% approval rate. Disability analysts will work in partnership with the attorneys to prepare for hearings. They won't be the case manager but will partner in decisions and provide direction as far as what the clients will need. **ACTION:** Is there a flow chart available? Patrick will provide information that's being distributed at the Summits. Later in the meeting, Patrick distributed two handouts; "My Self Assessment" and "TANF Workgroup Briefing Sheet" that includes a flow chart. **(Done 8/2/07)**

Pre-SSI: Shirley asked a question about GA and Pre-SSI. How will it be handled? Currently, when TANF clients apply for SSI and are approved, it reduces the amount of the settlement because of other funding. Now the funds will come back to the state for the adult only. The entire family will be moved to the new program but we will only recover

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funds for the adult portion of the grant. We continue to work on the details with SSA. State-only funds are being used for the Pre-SSI program. We tried to set the benefit level so clients had some money available for attorney costs and a remaining lump sum.

DHS, CAF Disqualifications Review: As we begin to make changes to the disqualification process (re-engagement), the workgroup is wrestling with how to handle the transition. A lot of work has been done with clients in the past on sanctions. We want to review all sanction cases to ensure sanctions were appropriate. We want this to be an opportunity for clients to re-engage in the program. We will be sending out a letter to all clients currently on sanctions to invite them in to work with their case manager on a new plan that will cancel out their sanctions. Clients with current JOBS disqualifications will be reviewed, even after TANF has been closed. We had 579 cases July 2007 and expect another 200 clients added in August.

Rosemary asked for additional information regarding compliance in returning to work after having a child. It will change from 3 to 6 months in October (4 months for 19 and under). What will happen to disqualified clients who didn't engage in JOBS at 3 months? How will domestic violence advocacy be included? It often takes more time to deal with the effects of DV trauma and the ability to leave the child and return to work. The long-term affects need to be considered, not just the physical relief of DV. DV issues, past and present, will be addressed in the review process.

Michael said his program has a family systems navigator to assist clients. This model should be reviewed. It's often difficult for clients to engage with mental health staff at DHS; they get lost and often don't come back.

Rob asked what's happened since the June meeting. What are DHS plans for implementation on October 1st and how can the FSRC assist? There is a legislative budget note that requires DHS to report back to the legislature on the sanctions piece. We will report in September 2007 and March 2008. **ACTION:** Vic will provide a status report at the September FSRC meeting. The March report will review the first six months of the new program.

Training: We are taking a hard look at our training functions to improve current weaknesses and ensure that staff training needs are strengthened. Self-sufficiency (SS) case managers are being trained in the Dr. Ford strength-based practice to help them deal more effectively with clients. Kim asked if all FSRC members had seen the Dr. Ford training. It would be good for members to review training if possible. Need to ensure that the training meets the performance measures. **ACTION:** The training materials aren't available electronically but will be provided at the September meeting. As staff is trained to the Dr. Ford model, we should see changes to the Grievance Reports.

Rosemary asked how the shift in services is working and what the workers attitudes are regarding the new program. Kim said “its human nature, some will and some won’t engage in this training model”. Test will be measured against the outcomes of the performance measures and movement towards engagement of clients. Diane has heard mixed responses, posters are up and workers are using the language. Her staff loved the group portion of the Dr. Ford training. Vic acknowledged the range of reactions is normal. It’s a dynamic that takes time to catch on but is being reinforced in the summits. Angela attended a portion of the Dr. Ford training and really like it but asked if on-going training would be available. It will be an on-going effort; training needs to be presented to managers and support staff to make cultural change in field offices. Maggie asked about the philosophy of training. Dr. Ford has a great deal of history working in this program environment and has trained around the country with a strength-based model. She uses a pragmatic approach to help both clients and workers assess programs. It is very outcome oriented, not a feel good approach, which emphasizes the partnership between client and worker to find solutions. It helps clients assess their strengths, own their situation and work towards self sufficiency. It uses a social work approach to help empower clients. Client plans are written in partnership with the client taking the lead. The client fills out a self-assessment tool to provide information to the case manager. Philadelphia has requested Oregon’s assessment document to use. Dr. Ford has given us access to all of her materials. She is engaged in helping Oregon accomplish its goals. She may come back periodically. Individual districts may also be bringing her back. Other DHS trainers are going out to the field offices to share her philosophy. We’re asking both case managers and clients to make this change – this is the new direction.

Diane thought it would be nice to have a response to case managers and clients feelings that “it all changes every 2-3 years and why this new approach will take hold?” Dr. Ford has asked if management supports this change. Vic said he’s there in training because management is behind the change. Case managers and clients have to take responsibility to engage in these changes. Mike has been using the strength-based approach for many years. He’s excited about how it has engaged juveniles and parents. It helps identify other barriers for the juvenile client. Change takes time; pre-conceived ideas have to be put aside and each client’s needs have to be addressed. Kim would like the FSRC to be notified when Ford training will be held in field offices. She thinks this shift in training and emphasis has helped the direction of TANF reauthorization. **ACTION:** Rosemary asked for copies of the packet of information clients receive when they apply for services. Nancy will obtain packets for the September meeting. Rosemary believes the strength-based model has made a huge difference in our work with clients; moving from shame based approach to a working partnership. A good worker can make a huge difference in the working relationship and the client’s ability to move in a positive direction in their lives. Some staff are being very innovative in how they are working with clients. District 3 (Marion, Polk, Yamhill counties) has put together a packet of information that includes a DVD that clients take with them. **ACTION:** Obtain copies of the training packet and

DVD and arrange to watch parts of it at the September meeting. Shirley feels it's okay if changes are made every few years as long as we are moving forward. Mickey added that change is all about relationships. This fits into the Ford training as well as the DHS Core Values and work with the Legislature. This made a huge difference at the end of session.

Food Stamp Reauthorization Proposal: Current plan expires on September 20th. The reauthorization proposal has passed out of the federal House. Categorical eligibility is still in tact in current version. Modifications may be made on the Senate side. Jessica said the Senate will address the bill after the August recess and that the President has threatened to veto it.

Rules: October 1st rules have gone out for feedback. The new draft plan is expected by mid-August. **ACTION**: Nancy will send out again electronically. **(Done 8/2/07)** Can Mavel provide OLC comments to Nancy so she can distribute to FSRC. Policy committee has historically reviewed the regulations.

Grievance Report - review and comment on grievances: No comments or questions.

Customer Service Subcommittee: Discuss startup of the Customer Service Subcommittee -- Who would like to serve on this group? It will require separate public meetings with agenda and meeting notices posted to the FSRC web site. The subcommittee will discuss training, core values, and identify quality control issues on customer service and bring details to FSRC for review. Angela (if she is allowed the additional time from her office), Jessica, and Peggy are interested.

Review of Strategic Plan:

Rob quickly reviewed the 2006-07 Strategic Plan. The four main areas are: 1) regulations, 2) customer service, 3) building relationships/partnerships, and 4) influencing legislation during the 2007 session. Discussion continued on updating this document for 2007-08.

ACTION: Work on creating the 2008 plan at the October meeting; add recruitment committee to address membership issues.

The FSRC should look at the following items: 1) How contract funds are being used since program delivery is accomplished through the contracted providers. 2) FSRC should have seen Ford training materials before training was rolled out. Feedback from this group is important but FSRC has to have information up front. 3) How can communication be more constructive? 4) Constant focus on clients being treated with kindness.

Progress has been made over the years. It appears that the program is changing, something that hasn't happened since the waivers were established.

Meeting schedule was discussed.

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- It may be useful for FSRC to meet for a longer period of time in the morning to review and discuss information packets prior to DHS staff joining the meeting. FSRC members have to be committed to showing up on time and being prepared for the opening conversations or it doesn't work. We have to be mindful of everyone's schedules.
- Need two prong approach, decipher the information and know what will be discussed by the program managers. Diane thinks today's discussion was good because Vic focused on topics. The last few years we have consolidated the agenda instead of having standing reports from particular units, i.e. food stamps. DHS is listening to the FSRC members, especially if we continue to be clear and concise. Possibly have only one or two DHS staff attend meetings. Rosemary feels that progress has been made. Mike has questions about how we get information and how we use meeting discussion time. Need to drill down to other questions in program areas. Can we build our agendas on the outcomes of the items in the strategic plan? Each meeting should include at least two items that can be addressed and accomplished. Rob was commended on how he has built agendas to include items in our strategic plan.
- May need two part document, Strategic Plan (very brief) and Operating Plan with more detail. October 4th meeting – need commitment from members to be here. Suggestion was to work with CAF staff on JOBS program, TANF and Food Stamps from 8:30 to 10:00 a.m. FSRC members would stay over and have a three hour planning meeting. Begin with review of the current plan, and follow with brainstorming items to be added. Last year we used the environmental scan prepared by Rob to brainstorm items. Need to determine if the strategic plan meets the statutory requirements. Also need to discuss committee requirements and commitments to Commission. Two part process; 1) brainstorm issues, 2) create actual plan.
- Shirley would like to arrange for field trips to evaluate how things are working in the field. In the past, meetings were held at different locations. Members started feeling like it was a dog and pony show and we didn't get a real picture of the services. Contractors were also visited. Attending trainings can also be insightful; you get the case manager's real feelings. Possibly smaller group of commissioners could visit different sites, but would need to determine purpose of visits before they are scheduled.
- Ad Hoc Committee on Membership Subcommittee
Rosemary, Jessica, and Mavel held a conference call. This is a public meeting and needs to follow the requirements. Want to get additional information on process; what is the FSRC role in recruitment? Want to know timelines, etc. Need a better understanding of orientation. What does the welcome packet include? **ACTION:** Nancy to send welcome packets to Jessica, Mavel, and Rosemary. **(Done 8/16/07)** Address in strategic plan and include one page mechanics document, Roberts Rules of Order, discuss ways to survey commissioners for strengths and weaknesses. Potential candidate names and information should be given to the Recruitment Committee for follow-up.
- Partnership Subcommittees: Discuss recent activities:

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- Child Welfare Advisory Committee – Diane Cohen-Alpert
Good meeting, glad we are connecting with them. Concern being heard on defining safety with the new Oregon Safety Model and how it relates to work we are doing because of the cross over of child welfare and self-sufficiency clients. Diane decided to hold information to next meeting since so many members left early.
- Advisory Committee on OAR related to threats of violence – Peggy Kennerly
Restricting access draft was sent out electronically, with hard copy provided at meeting. A due process piece has been added. Peggy has identified other issues that need to be addressed. Are there any other concerns? Please send comments to Peggy. The committee is waiting for a response on disruptive behavior language from the AAG, to be addressed under prohibitive conduct in section C. Some of the restrictions may go against the ADA. The AAG will provide feedback on ADA issues. Page 3, 00200, exclusion in #3 doesn't include residential facilities. Outside facilities have their own guidelines and rules. Voc Rehab's ability to dismiss clients was discussed. The notice currently sent doesn't include statement regarding their appeal rights. It is not a hearing process, but goes to DHS staff to monitor. Peggy was thanked for her work and replied that she is very interested in this work.
- Customer/Client Regulation Development Project – Angela Sanchez
Final date for comments was July 27th. Complaint forms are being revised, new posters, rule and procedures are being developed by September 1st.
- Customer Service group will meet via email to schedule meeting. An email will be sent to commission members to determine interest.
- Family Support Work Group – Maggie Bagon, no report

Next Meeting: The next FSRC meeting is scheduled for September 6, 2007, 8:30 a.m. to noon, in HSB-252. Please let Nancy know if you plan to attend by Video Conferencing or phone by Friday, August 17th.

Meeting adjourned at 12:10 a.m.