

**WORKGROUP TO REDUCE RELIANCE  
ON PUBLIC ASSISTANCE**

**EXECUTIVE SUMMARY**

**APRIL 15, 2015**

The Workgroup to Reduce Reliance on Public Assistance was created by Section 751.37 of House Bill 483 of the 130<sup>th</sup> Ohio General Assembly. The workgroup shares the desire of many to help more Ohioans reduce their reliance on public assistance. Achieving this outcome requires a strategic, outcome- and evidence-based, achievable plan that accommodates both the short-term and long-term needs of those reliant on public assistance. For that reason, between December 2014 and March 2015, the workgroup embarked on a significant effort to analyze Ohio's current systems serving public assistance recipients. Workgroup members surveyed county agency directors and community stakeholders who work closely with public assistance recipients. They also held focus groups with public assistance recipients. The workgroup researched current and past efforts in multiple states to serve this population.

After research and analysis, the workgroup identified six priority areas that it recommends be part of a new person-centered case management system that can be successful in all regions of the state, from the smallest rural communities to the largest urban centers.

## **PRIORITY AREAS**

1. **Person-Centered Case Management: A Strategy to Begin Reducing Reliance on Public Assistance**
  - *Defining person-centered case management*
  - *Standardized tools, flexible delivery*
  - *Utilizing existing research and demonstrated best practices*
2. **Strategy Implementation: A Starting Point**
  - *Defining targeted populations*
  - *Acknowledging demographic differences*
  - *Expanding on demonstrated success*
3. **Resources Needed for Implementation**
  - *Financial resources and funding stream complications*
  - *Human resources*
  - *Technology and data-sharing*
  - *Local social service network infrastructure*
4. **Performance Measures**
  - *Individualized goals for individualized case management*
  - *Success: A long and complicated path*
  - *Piloting the strategy for future standards*
5. **Competing Performance Metrics and Legislative Advocacy**
  - *Existing compliance requirements*
  - *Funding implications*
  - *Opportunities to impact rule change*
6. **Public Messaging: Poverty is a Community Conversation**
  - *Partners in improving the lives of all Ohioans*

## Priority 1: Person-Centered Case Management: A Strategy to Begin Reducing Reliance on Public Assistance

### Recommendations:

- Person-centered case management must be at the heart of any serious effort to reduce reliance on public assistance.
- The workgroup recommends this working description of person-centered case management: *Complete robust assessments/reassessments of participants. Develop self-sufficiency plans in conjunction with the outcomes of assessments/reassessments. Assign participants; reassign participants as needed. Provide direct connection and/or referrals to supportive services. Follow up on referrals to ensure that the needed services are pursued, delivered, and modified as needed. Document compliance and non-compliance with self-sufficiency plans. Engage in proactive and regular outreach to participants, which may include home visits to ensure ongoing and active barrier removal for transportation, hands-on support in pursuit of employment, housing, Supplemental Security Income, child care, etc.*
- A common electronic assessment tool should be developed and utilized in all 88 counties and should be supported by a robust case management system with strong reporting capabilities.
- Ensure flexibility at the local level to enhance the likelihood of successful implementation. Significant differences in barriers and social service network infrastructure in various parts of the state require this approach.
- Conduct further research of existing programs that have had successful outcomes on a large scale.
- **Ensure that service providers serve all those eligible.** No serious effort to reduce reliance on public assistance can serve only those who have little or no criminal history or who can pass a drug test. Rather than target clients with few barriers, the strategy must ensure the success of those with multiple and substantial barriers.

## Priority 2: Strategy Implementation: A Starting Point

### Recommendations:

- Due to the significant shift in practice that will be required to implement an effective person-centered case management program, Ohio should target a subset of public assistance recipients initially. The workgroup recommends initially targeting Ohio Works First recipients who are 16 to 24 years old and who have work requirements.

## Priority 3: Resources Needed for Implementation

### Recommendations:

- The most basic requirement for successful economic independence is the availability of jobs paying wages sufficient to move people off public assistance. Economic development efforts must be engaged.

- All communities must have the appropriate resources and infrastructure in place to implement a person-centered case management program. An analysis should be completed in each community to determine gaps between the workforce needs of employers and the skill sets of public assistance recipients. Greater partnerships with local community colleges and vocational programs must be developed and maximized to create short-term education and career pathways that lead to employment in high-wage, high-growth industries.
- Policymakers should recognize that current caseload sizes are not designed for person-centered case management and should be reduced to resemble child welfare caseload sizes.
- Policymakers should also recognize the demographic and resource differences among counties and give communities the flexibility to provide services appropriate for local needs.
- Additional financial resources will be needed to effectively implement this program.
- In order for both recipients and a person-centered case management system to be successful, it must be possible for information to be shared between programs and data systems.
- A robust statewide case management system must be developed to support person-centered case management.

#### **Priority 4: Performance Measures**

##### **Recommendations:**

- Performance measures must clarify the responsibilities of both the agency and the recipient.
- When measures are devised, it should be recognized that many public assistance recipients face significant barriers and will not simply “leap out of poverty” with a job, but rather move along an “incremental ladder.”
- Recipients must be actively engaged in the assessment and goal-setting process in order to achieve better outcomes.

#### **Priority 5: Competing Performance Metrics and Legislative Advocacy**

##### **Recommendations:**

- Many public assistance recipients are also involved in other public systems, which may have competing goals and requirements. Priority goals and outcomes should be determined.
- Programmatic definitions, requirements and performance expectations should be aligned. Federal waiver requests should be considered.

#### **Priority 6: Public Messaging: Poverty is a Community Conversation**

##### **Recommendations:**

- A variety of partners must be included in conversations about poverty in all communities.
- No single entity can provide the full array of resources needed for recipients to progress toward economic independence. This must be a community-wide effort.

- Public messaging should be developed to ensure that all stakeholders, community partners and legislators are aware of the successes achieved by public assistance recipients and the difficult challenges some still face.

## **SURVEYS**

In developing its priorities and recommendations, the workgroup surveyed directors of county departments of job and family services and stakeholders who work with public assistance recipients to solicit their expertise and experience. The survey asked them what they believed to be the most prevalent barriers to economic independence in their communities. It also asked what they believed to be the best way of helping recipients overcome those barriers.

### **Findings and Recommendations:**

- Overall, county directors ranked substance abuse issues or inability to pass a drug test as the most significant barrier preventing public assistance recipients from moving out of poverty. Stakeholders also ranked this barrier high, fifth out of 16 potential choices. Significant resources and effort should be dedicated to addressing this issue.
- Overall, stakeholders ranked lack of jobs and/or lack of jobs of an appropriate skill level as the biggest hurdle facing public assistance recipients. Directors also ranked this issue highly, placing it fifth out of 16. They noted that not all jobs will reduce reliance on public assistance.
- Overall, directors and stakeholders ranked lack of transportation as the second most significant barrier. The workgroup recommends that this issue be more fully analyzed to develop solutions.
- Other issues that ranked high among both groups were lack of a high school diploma or General Educational Development (GED), mental health issues, and lack of work experience. The workgroup recommends that these barriers receive further attention. It also believes that an effective case management system should link recipients to services and monitor progress.
- Survey respondents emphasized that each county is unique and that communities should be given the flexibility to provide services appropriate based on local needs.
- There was little difference in directors' and stakeholders' perceptions of "job readiness." These perceptions should be used as a baseline when establishing performance measures and appropriate caseload sizes.
- Both county directors and stakeholders agreed that "one size does NOT fit all" when it comes to working with public assistance recipients. Most respondents agreed that the best way to help public assistance recipients overcome barriers is with varying combinations of immediate labor force attachment (through job search assistance, volunteer work experience and/or short-term education or training) and human capital development (skill-building and/or education and training activities prior to actively seeking employment). County directors were slightly more supportive of sanctioning recipients for failure to comply with program requirements.

## **FOCUS GROUPS**

Focus groups were conducted with current public assistance recipients. Participants agreed that a "one-size-fits-all" approach is not effective.

### **Findings and Recommendations:**

- Focus group members indicated that they need more personalized attention and active case management. This was consistent with workgroup recommendations for person-centered case management.

- Focus group members were not opposed to being required to engage in activities to help them move off public assistance, but they felt strongly that those activities should be more meaningful, such as courses that advance their education, job training or life skills training. The workgroup recommends that a person-centered case management system link recipients to more productive assignments.
- Focus group members identified public housing clusters as the most significant factor contributing to generational poverty. The workgroup believes this issue requires further investigation. It recommends that additional focus groups be conducted of public assistance recipients residing in public housing, with action steps developed to address the issues identified.

