

Family Services Review Commission Meeting

November 1, 2007

HSB-252

Members present: Maggie Bagon, Doreen Binder, Jessica Chanay, Diane Cohen-Alpert, Rosemary Lazzari, Mavel Morales (VCON), Peggy Kennerly, Rob Potter and Michael Ware

Members excused: Kim Freeman, Shirley Kaping, and Angela Sanchez

Members absent: Bonnie Davidson and Miranda Herrera

DHS staff present: Dr. Bruce Goldberg, Ramona Foley, Jim Neely, Vic Todd, Dave Lyda, Patrick Ring and Nancy Sathrum

Administrative Handouts, sent via email prior to the meeting: Meeting Agenda, Draft Minutes of the October 4th FSRC Meeting, DHS Summary of Complaints Report for September 2007, 2006-07 Strategic Plan Accomplishments, 2008-09 Environmental Scan Outline

Additional Administrative Handouts at meeting: 2008 FSRC Meeting Schedule, DCI Report, Draft Graph showing New ERDC Co-pay for a Family of Three, September 2007 Public Assistance Caseload, First Edition, Self Sufficiency Brochures, 2008 TANF State Plan, Letters to Sen. Wyden and Sen. Smith regarding Food Stamps, Table of Proposed Legislation for FS Reauthorization for FFY 2008, TANF/JOBS Program Disqualification Review for July – September 2007, FSRC Chair and Vice-Chair Nomination Process 2008-2010, FSRC Strategic Planning Process 2007

Greeting and Roll Call

Meeting called to order at 8:20 a.m. with a quorum in attendance.

Chair Report:

- Action and follow-up items: None discussed.
- Approval of October 4th Minutes: Rosemary motioned and Michael seconded the approval of the October 4th, 2007 FSRC meeting minutes. Vote of approval was unanimous.
- Commission Policies and Operating Procedures: Not discussed.
- By-laws – election of officers at January meeting: Jessica distributed handouts to be included in operating procedures document (ACTION: Nancy). Nominations for officers to be emailed to Rob by November 28th so nominees can share briefly why they are interested in serving at the December meeting. Commissioners will vote on the chair/vice-chair positions at the January 2008 meeting.

CAF Report, Dr. Bruce Goldberg, Ramona Foley, Jim Neely, Vic Todd, Dave Lyda:

Rob acknowledged Ramona's retirement announcement. Dr. Goldberg joined the meeting at 8:45 a.m. Rob welcomed Dr. Goldberg and asked for his ideas on the new

“transformation initiative”, what he sees coming in the next year, the role of the FSRC, etc.

Thoughts on key issues from Bruce’s perspective:

- Transformation initiative: DHS is working with McKinsey and Company on this transformation project. The goal is to make DHS a world class organization. The structure is in place to provide services, but we must continue to seek best ways to accomplish work in a time and place where the trust in government and the ability to do this work is lacking. It will be a comprehensive effort to address issues across the organization and look for ways to improve our performance. A pilot project was done in Financial Services to analyze current work flow and find how we can increase efficiency, using the same process that private companies use to increase productivity.
- Advisory groups assist DHS in determining how we can accomplish this. Feedback from clients, staff and stakeholders indicate they want what the initiative offers. This dovetails with the Strategic Planning for the FSRC. Bruce is surprised at how broad the statute and the charge of the FSRC are. Many of our clients access multiple programs, so Bruce suggested that the FSRC focus on what DHS does for clients as an organization. Our programs are all connected and we need to re-think what we do. With the additional funding DHS received from the legislature and the advancements in technology, it is a good time to make changes in how we provide services.
 - Doreen asked what the response has been from DHS staff. Bruce has visited 30 field office in the last 45 days and has had three primary responses from staff; 1) staff are absolutely enthusiastic and want to be the best, want to improve and make it happen, 2) staff are skeptical and want to be shown how this will happen, and 3) staff ask if DHS is really serious about this and feel that it can’t happen fast enough.
 - Diane heard Bruce speak at a meeting she attended and was fascinated by the questions people were asking. The conversations after the meeting were also interesting. Additional training is needed to help workers obtain the necessary skills to help clients.
 - Peggy mentioned that we need to get to the basic level of how clients live and help them learn to cope with the issues in their lives. Need to recognize and work on these issues simultaneously and interconnect client’s problems. Focus on the real barriers for clients; health plan, food, mental health, etc. Although the DHS focus is from birth to death, we should support children’s programs first to make a change in the large picture.
 - Doreen mentioned a 10-year plan to end homelessness. It won’t happen until we deal with poverty. While focus of work is on the chronically homeless, other clients become chronically homeless.

- Rosemary: Try to build in an incentive to buy healthier food and move to a holistic approach. These choices become very difficult when resources are limited. Rosemary appreciates Bruce's leadership and asked how the FSRC can support the direction that DHS is moving.
- Jessica also asked about the FSRC role in supporting the direction of DHS.
- Bruce spoke again about the transitional initiative and the work of the McKinsey Group. The plan is to analyze best practices and standards, reach consensus and prepare a plan to achieve results over the next two to four years. Bruce acknowledged the interface between the FSRC and DHS and wants feedback on what the FSRC thinks DHS should be doing to accomplish its mission.
- Vic believes the FSRC played a significant role in the TANF reorganization process through open communication and support during the legislative session. Continued work on this partnership and future strategy is important as we move forward. Items still needing work include the Farm Bill and the ERDC program. Working together and integrating efforts will help achieve a holistic approach to clients' needs.

Input for the FSRC 2008-09 Strategic Plan:

Jim Neely was asked for his ideas about future big issues on the horizon for DHS and clients. Jim stated that it is hard to compare the FSRC role today as compared to a number of years ago. There has been a huge change in attitude and ability to work together to move programs forward to accomplish our mission and goals. TANF is great example of how DHS and the FSRC are working together. Doreen agreed that it is night and day, and attributes it to Bruce and Rob's leadership.

Ramona said there has been a paternalistic approach to welfare in this country for many years, but questions where that has gotten us. There is a large part of our society that wants people to make their own choices. Her hope is that there will be a change in priorities with the new administration in DC.

Doreen spoke about needing to find more effective ways to assist clients, not just hide them and get them out of the public's view. Clients are given such limited choices that it often makes the situation worse. Rob added that communities are tired of seeing people on the streets. New York is now paying some parents for things that parents should automatically be doing. Need internal motivation and a broader education piece to motivate clients to make better choices. The system sometimes rewards bad choices and behavior. Diane mentioned the garden programs that can help change attitudes. If funding was used on community gardens, it may save money in health care services. Peer assistance and voucher systems to purchase locally grown produce can often be successful. Peggy said a well controlled pilot project would be needed so progress could be tracked. Look to volunteer assistance to help accomplish the established goals. These

types of programs may affect people's lives long term. Program structures don't change people, but hope for a better future can give them the incentive to make necessary changes in their personal lives. The New York project gives people the opportunity and incentive to do the right thing. Doreen has traveled extensively through the years and has observed that most countries subsidize vegetables, milk and bread. We don't do that in the United States, and even with education, clients often can't afford these items.

TANF General Update, Vic Todd and Dave Lyda

Dave Lyda distributed the TANF/JOBS Program Disqualification Review – July to September 2007 and the September Opportunity report. The new policy implemented on October 1, 2007 creates a more streamlined, strength-based program with a focus on re-engaging clients. The program has been renamed from conciliation to re-engagement. The new process gives DHS the opportunity to be proactive to re-engage clients. Cases where clients were disqualified between July and September 2007 were reviewed to assure proper procedures were followed and documented. The results are included in the report. Also included are details of the September Opportunity encouraging clients to re-engage in the program services. Of the 802 disqualification cases reviewed, we found that about 2/3rds lacked documentation and evidence that specific services were offered of processes followed. Many of these disqualifications were removed and we are providing supplements to correct the errors. We were unable to locate some of the families eligible for a supplement. Entries have been narrated in TRACS with the amounts available to these families if they re-enter the system. The average supplement was about \$440. During the first week of September 2007, approximately 324 letters were sent to clients with active disqualifications asking them to come in to discuss the new process with their caseworker. DHS staff was asked to follow up if they don't hear from clients.

What have we learned? We need to do a better job documenting work with clients and consulting with community partners to move forward and strengthen our local processes. The focus is on making sure we've done all we can to help clients move forward.

Rosemary has attended meetings in her local DHS office and witnessed a level of frustration with the amount of TRACS documentation needed. This takes time away from work with clients. Vic has also heard this as he's traveled around the state attending the Summits. We hope to have better outcomes for clients at the next review. Peggy has found that staff with good attitudes know that good documentation is part of their work and people with bad attitudes don't see the same connection and are disgruntled about the documentation. Staff needs to understand that documentation is an important part of the job and critical to appropriate services being provided.

Diane thinks DHS staff receives some pleasure in offering clients new opportunities. Diane appreciates the work done on the report and believes it helps motivate staff to do their best work. Doreen asked Vic and Dave how they feel about the report and what has been accomplished. Vic said there are mixed feelings. Staff has done their best to undo sanctions and give clients the opportunity to engage in the new process. Vic was disappointed to see the high numbers but it brought issues to the forefront at the Summits. Vic and Dave sat in on these sessions to hear the frustrations and discuss the re-engagement process. Jim agreed that the jury is still out; he was surprised to see the high numbers but hopes to have a better picture a few months down the road when we see if clients are actually re-engaging. Jessica asked what clients are being told. An example of the follow-up is included in the handout. DHS wants to make sure we have an updated plan to work together with clients and assist them to meet their goals. Rob thanked Dave for providing the report.

Grievance Report: No discussion.

Part I: 2008 – 2009 Strategic Plan Development

- Review 2006-2007 Strategic Plan and mission statement.
- Discuss planning session process and expectations.

Jessica distributed handouts she prepared following the proposed outline and process.

- Review 2006 – 2007 FSRC accomplishments
- See pre-work handout for discussion.

Rob went through the accomplishments document and ranked FSRC goals as high, medium, or low.

Goal A: have done a pretty good job

Goal B: B2, not so good; B-3, okay (could do more on both)

Goal C: C2 and 3, high, good job

Goal D: D3, high

Diane: FSRC has done a pretty good job; TANF Reauthorization Committee – Diane and Doreen; CWAC - Diane (Diane, Doreen); great partnership built with DHS and CAF. Asked how we can better build the FSRC, recruitment, etc. Diane commended Rob for his work on the accomplishments document.

Rosemary: It is important to recognize member's commitment and work for the commission and their willingness to take on legislative testimony and work group representation. Increase discussion to build further partnerships.

Michael: He would like to widen conversations to include the many black people in jail, how it affects the community, and how DHS engages these families. He is happy with the new strategy to mentor workers and clients and feels like we're getting closer

to meeting vision of where we want to see clients in the future. DHS staff needs to really listen to clients, engage and assist them to meet their own needs.

Peggy reinforced this idea and said the client's largest need may not even be identified by them. Clients have many complex issues and workers need to work holistically with them by really listening and discussing issues with them. This approach is not currently built into the system.

Doreen: This has been a long process. We have made some progress, but still concerned about other issues. For example, race issues, diversity and cultural competency are being discussed but real issues aren't being addressed appropriately. How can we educate others that providing one service doesn't meet all the needs and keeping status quo doesn't move us forward? Certain populations culturally won't question the disqualification; they may walk away too easily.

Peggy: The FSRC has had much discussion about policy and practice and giving feedback, but the feedback isn't targeted. Consolidation of the discussion and proposals are needed. Think more carefully about how meetings are run, push agendas, come to a consensus, and formulate specific requests for information so conclusions can be reached. What does DHS staff take away from these meetings?

Doreen would like the strategic plan to be more detailed and specific. Focus on a few items and really try to make a difference.

Michael would like to partner with DHS to accomplish goals. Everyone brings individual passions to the commission. Have a focused, guided debrief after DHS presentation to come up with 2-3 questions on the subject discussed. What would FSRC want DHS to know to help lead the issues? How can we help drive initiatives that DHS needs to move forward? What, why, where, when? How does DHS relate to other agencies? How does the Oregon Health Plan figure into planning for self sufficiency services?

Doreen realizes that DHS has to address federal issues, but we need to ask specific questions and keep issues on the table to reach the outcomes we want addressed. DHS looks globally at issues instead of targeting work on certain issues. Need to know who isn't getting services so we can target outreach; blacks, Native Americans, Hispanics, neighborhoods, etc. The global look is too large. What is the DHS outreach? What is the FSRC outreach to stakeholders? DHS should be going out into the community to provide services instead of expecting clients to come to them. Encourage DHS to set up programs we can study to determine how certain groups can be targeted with best practice services.

Rosemary: Recapping today's discussion, she is hearing that the FSRC wants to focus energy on specific items we want to accomplish, debrief and come up with questions for DHS. What is our process to focus energy to look at specific issues? Take one or two goals and integrate into all areas; i.e. best practices for targeted populations, establish concrete filter to examine issues, and ask the right questions.

Doreen wants to know how we are reaching out to the neediest populations and who are they, regardless of what the issue is. Is DHS being inclusive?

Jessica echoed what has been shared, the scope is so large and it feels like it is overwhelming and mind boggling. She has been frustrated with how meetings are structured. The FSRC doesn't stay focused or come to a consensus to provide advice to DHS. FSRC may want to hang hat on something to narrow scope throughout all program areas; maybe best practice. How can we refine systems to achieve best outcomes for clients?

Environmental scan - identify key trends and issues

- Review environmental scan – see handout
- Identify key trends/issues that will affect Strategic Plan

Jessica edited document to focus on clients. Rob likes screen that Peggy suggested; best practice and outreach, how to engage disenfranchised people.

Look at holistic client approach. Maybe that should be our filter. DHS can provide reports on programs but we can provide overarching advice across programs. DHS has identified items they aren't doing well and would like to improve. Identify items, discuss and give advice within framework of today's discussion.

Shift focus from programs to client. Because of the many changes in TANF, the FSRC has to continue to look at the complaint process. Community partners have good information that would help us. Complaints are often not written up; they happen every day and are handled in many ways. The report doesn't give the real picture. What does the Oregon Law Center find? What are the outcomes of hearings? Where is the actual problem; worker, supervisor, leadership, etc.?

Outreach: How can DHS reach the clients that need our help, DV victims, etc.? How can the services actually help client and not put them in additional danger. Many people needing services won't access services for that reason. Look at issues from different perspectives, marketing, etc. If it is the right product, how do we market it to the correct people? Generic vs. targeted outreach; what is the scope of what we can actually do? It feels overwhelming. What is the FSRC's bottom line? Find focus and thread that runs through all the program areas? Is DHS reaching out to the neediest populations and how are they doing that?

Michael: Our concern and focus should be clients and families and how DHS is engaging disenfranchised populations. Ask DHS specific questions, i.e. how many clients are you engaging, how many of this number are part of the disenfranchised populations? Minority and female services haven't been provided adequately.

Doreen is in favor of universal health care and supports CHIPS, but wonders if certain populations will be left behind. Do we hit the populations we need to hit?

Jessica brought up another thought; the strength of the commission is members come from different backgrounds and have a different skill base. Discuss what we see working well and give suggestions on how DHS could better serve certain populations. Help to find and build a common thread. Develop a set of strategic questions to gather information.

Upcoming Legislative Session: Does the FSRC want to have a plan to provide information? It will be a short session with a limited number of bills, however, it is an opportunity to keep FSRC's name before the legislature. Peggy doesn't think we have to wait to see what opportunities we have as the session progresses. Good work was done last full session and wants to keep momentum.

ACTION: Nancy will type up flip charts and send electronically to Rob, Jessica, Rosemary, Michael, Diane, Doreen, and Peggy. **(Done 11/1/07)**

Consider holding meeting at Michael's office and possibly other locations. To be discussed and determined at future meeting.

Building relationships: FSRC should strategically plan who, how, etc.

Prioritize the top ten issues for the Strategic Plan: Not done because of time constraints.

Next Meeting: The next FSRC meeting is scheduled for December 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.

Meeting adjourned at 12:05 p.m.