

The Working Group believes that the Federal role appropriately should be that of (1) identifying and describing existing self-help programs; (2) encouraging and promoting successful self-help initiatives; and (3) working with self-help organizations to remove government barriers to their efforts.

It is in light of these general comments that the Working Group recommends the following actions to the Board. The Working Group endorses, in general, the workshop conferees' five major recommendations indicated below, and believes that the objectives of many of the more specific recommendations can be accomplished within the guidelines noted above.

RECOMMENDATION I:

"Self-help organizations should be strengthened to play a greatly expanded role in achieving the goals of welfare reform through a series of demonstration projects."

Among specific suggestions made at the workshop, participants proposed the initiation of 25 welfare reform demonstrations to explore the potential of self-help groups in a broad array of activities, ranging from providing services, such as public housing management, to developing small businesses.

Response:

The Administration should support this recommendation's general goal.

Demonstrations to develop, use, and assess self-help approaches should be encouraged in accordance with the general principles identified by the Working Group. The Board should promote and encourage demonstration projects, either by identifying existing projects with proven success or by using current budget authority for demonstration projects. The Board should also promote recognition of local self-help efforts at the state level.

Suggested Actions:

1. The President should direct the Board to prepare a plan to identify during the next 12 months promising demonstration projects, involving either demonstrations already underway, or new, cost-neutral demonstration projects submitted to the Board by the states that can be undertaken within existing agency resources and budgets. In accordance with standard Board procedures, new welfare reform demonstrations incorporating self-help approaches that are presented to the Board must be sponsored by the state in which the group is situated, and assessed according to the same criteria that the federal government uses to approve state demonstrations:

cost-neutrality and soundness of the evaluation plan.

2. Federal agencies which grant funds for self-help projects should be requested to ensure that as many inventive new projects are encouraged as can reasonably be accommodated within existing budgetary guidelines.
3. The Board should encourage state and local governments to work with self-help groups in developing demonstration activities in their jurisdictions. In identifying and developing such demonstrations, states and localities should make efforts to work more effectively with and utilize the resources and technical expertise of a range of existing resources such as other community-based organizations, university and independent study centers.

RECOMMENDATION II:

"The present legal and administrative barriers to a more effective welfare system ought to be reduced or eliminated."

Workshop participants suggested that States and local governments be permitted greater flexibility in tailoring benefits to individual needs. Toward this end the creation of federal and state welfare reform review boards also was suggested.

Response:

The Administration should support this recommendation, with modifications.

Efforts to remove legal and administrative barriers to self-sufficiency should certainly include providing states and localities greater flexibility in administering federal regulations and federally provided funds. As a result of the interagency waiver process coordinated by the Board, major steps in this direction already have occurred. These steps have permitted adapting federal laws and regulations to local needs and dependency-reducing approaches through state welfare reform demonstrations.

The Working Group believes the present Board meets the objectives of this recommendation. The creation of a new federal welfare reform review board would duplicate the work of the Board. However, the states should be encouraged to explore ways to increase the involvement of self-help leaders in improving the "Up From Dependency" process, with advisory committees being one step with significant potential.

The call to remove barriers goes further, however, and has special significance regarding self-help. Any major thrust to

identify and remove barriers to self-help must start with the body of law involved. Regulations grow out of legislation. So educating elected officials--from Congress to local officials--about self-help, is very important.

Suggested Actions:

1. The Board should invite states, localities and self-help groups to identify legal and administrative barriers to self-sufficiency at the federal, state and local levels and to suggest strategies for overcoming them. As part of this effort, the Board should call upon relevant agencies within the Executive Branch to identify federal impediments to creative self-help efforts.
2. The Board should dedicate a meeting of the Board on a regularly scheduled basis to discuss the information provided by states, localities and self-help groups on self-sufficiency efforts in a broad range of areas. In addition, the Board should encourage states to consult with self-help groups in developing state demonstration proposals involving self-help components.
3. The Administration should join with self-help leaders to improve understanding of the self-help process on the part of Congress and other officials.

RECOMMENDATION III:

"The exchange of useful information and experiences should be expanded and accelerated so that self-help organizations may become more effective instruments of reform."

Workshop participants proposed a broad range of initiatives at the federal, state and local levels to facilitate the exchange of information and experiences concerning promising self-help efforts.

Response:

The Administration should support this recommendation's general goal.

We concur that the federal government should assign high priority to promoting successful self-help initiatives. To accomplish that objective, self-help efforts that currently exist should be identified and assessed. A major step by the White House in this area was the description of a selected 385 self-help programs in a volume of the 1986 series of Up From Dependency reports. This Self-Help Catalog should be expanded and more widely and effectively distributed to self-help groups, public officials and

academia.

The Working Group believes that the private sector can more effectively develop such projects as operation of a clearinghouse.

Suggested Actions:

1. The President should direct the Board to continue to facilitate the exchange of information on successful self-help initiatives. To carry out this function, the Board should develop an information dissemination strategy that would include the identification and promotion of self-help projects sponsored with federal funds, and the identification of ways that existing information clearinghouses and other information sources could be used more effectively to promote self-help efforts. The strategy should also explore the desirability and feasibility of a privately-financed central information exchange.
2. Governors should be encouraged to take steps to more effectively harness the energies of the self-help movement in the cause of reducing dependency. Distribution to the governors of the Workshop recommendations, and of the DPC-approved recommendations for responsive Administration actions, should be the first step. The Working Group recommends that the President be requested to contact the governors distributing the report and encouraging their participation.
3. The Working Group recommends that over the next six months, the Board update and expand the Self-Help Catalog and computerize the identification of self-help groups.

RECOMMENDATION IV:

"Outstanding self-help organization performance, individual efforts and corporate support should be recognized at state and national levels at annual conferences and award ceremonies."

Workshop participants proposed that awards for exemplary self-help efforts fostering progress by low income people be instituted by the President and governors.

Response:

The Administration should support this recommendation. Awards help surface and communicate what works. High priority should be given to the establishment of a Presidential Achievement Award for Self-Help, with awards to be focused on self-help among those of low income.

Suggested Actions:

1. As soon as possible, the President should be requested to establish annual non-monetary awards recognizing self-help achievements, so that the first annual awards can be given during this calendar year and be effectively promoted. At the same time, specific arrangements should be put in place to ensure that the award will attract major public attention.
2. State and local governments also should be encouraged to promote self-help efforts through such activities as major, state-wide public conferences, workshops and well-publicized award ceremonies.

RECOMMENDATION V:

"The Board should coordinate all federally-funded research on the opportunities and experiences of self-help organizations in welfare reform."

Response:

The Administration should support the thrust of this recommendation, but with modifications.

There is need for (and great potential in) assuring the flow of information among federal agencies, states, local governments and self-help groups on research pertinent to self-help initiatives. However, the Board should not have direct responsibility for coordinating all federally-funded research on self-help as a force in welfare reform, since this would involve an unwarranted transfer of agency responsibilities to the Board.

Suggested Action:

1. The Board should serve as a contact point for agencies to provide information on research relating to self-help efforts. As an initial step, and in addition to the suggested actions in response to Recommendation III, the Board should compile by December 30 a self-help research agenda identifying research and evaluation efforts underway in the federal agencies, involving relevant self-help activities, with special emphasis on the interaction between such activities and the current welfare system.

SEVEN VOLUMES IN THE WELFARE REFORM SERIES

Low Income Opportunity Working Group, Domestic Policy Council.
Up From Dependency: A New National Public Assistance Strategy.
Washington, D.C.: U.S. Government Printing Office, 1986.

Office of Policy Development, Executive Office of the President.
Up From Dependency, Supplement 1: The National Public Assistance
System. (Volume 1: An Overview of the Current System).
Washington, D.C.: U.S. Government Printing Office, 1986.

Interagency Low Income Opportunity Advisory Board, Executive
Office of the President. Up From Dependency, Supplement 1: The
National Public Assistance System. (Volume 2: A Compendium of
Public Assistance Programs - Major Federal Cash, Food, and
Housing Programs). Washington, D.C.: U.S. Government Printing
Office, 1987.

Interagency Low Income Opportunity Advisory Board, Executive
Office of the President. Up From Dependency, Supplement 1: The
National Public Assistance System. (Volume 3: A Compendium of
Public Assistance Programs - Major Federal Health, Service,
Employment, and Education Programs, Other Federal and State
Programs). Washington, D.C.: U.S. Government Printing Office,
1987.

Office of Policy Development, Executive Office of the President.
Up From Dependency, Supplement 3: A Self-Help Catalog.
Washington, D.C.: U.S. Government Printing Office, 1986.

Interagency Low Income Opportunity Advisory Board, Executive
Office of the President. Up From Dependency, Supplement 4:
Research Studies and Bibliography. Washington, D.C.: U.S.
Government Printing Office, 1988.

Interagency Low Income Opportunity Advisory Board, Executive
Office of the President. Up From Dependency, Supplement 5:
First Annual Report. Washington, D.C.: U.S. Government Printing
Office, 1988.

Note: Other supplements in the series are being planned.



AMERICAN PUBLIC WELFARE ASSOCIATION

Kevin W. Concannon, President
A. Sidney Johnson III, Executive Director

March 14, 1994

Kathleen Way
Special Assistant to the President
Room 218
OEOB, The White House
Washington, DC 20500

Dear Kathy,

I'm pleased to send you a copy of our new publication, *Managing JOBS Caseloads*.

APWA's Institute for Family Self-Sufficiency developed this report to help policy makers and practitioners assess the number of families that JOBS case managers are able to work with at any given time. It is especially helpful for JOBS administrators who are devising policies that target case management services to families most in need of such assistance.

I hope this report will serve as an important resource for you and your staff. Additional copies may be ordered by using the enclosed form.

Sincerely,

A handwritten signature in black ink, appearing to read "Sid", is written over a horizontal line.

A. Sidney Johnson III

Enclosure:

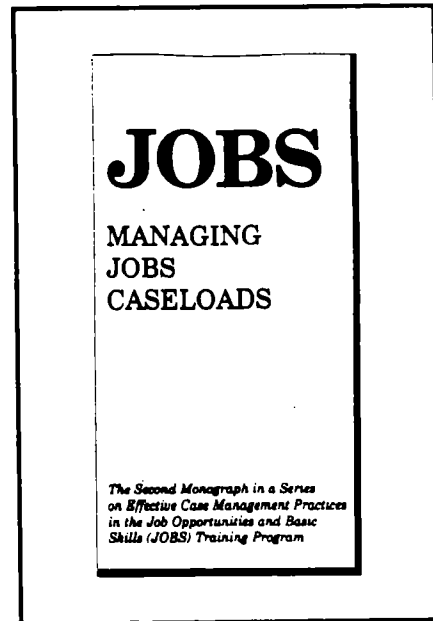
Announcing Publication of APWA's Report on *Managing JOBS Caseloads*

APWA's Institute for Family Self-Sufficiency introduces ***Managing JOBS Caseloads***, the second monograph in a series on effective case management practices in the Job Opportunities and Basic Skills (JOBS) Training Program. The report, based on a 1993 survey of state JOBS staff, presents findings on the range of client-to-case manager ratios in 21 states and the District of Columbia.

Managing JOBS Caseloads is designed to help policy makers and practitioners assess the number of clients that JOBS case managers are able to work with at any given time. It is especially helpful for JOBS administrators who are devising policies that target intensive case management to families most in need of such assistance.

Within this context, ***Managing JOBS Caseloads*** addresses the following issues:

- What is the range of client-to-staff ratios in a sample of JOBS programs?
- What strategies are JOBS programs using to (1) maintain low caseloads; (2) maximize case management resources; and (3) target case management to clients with severe supportive service needs?
- How can caseload size affect staff capacity to meet JOBS performance standards?
- What factors can state and local human service administrators consider when assessing the client-to-staff ratios of their JOBS program?



----- Order Form -----

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@ \$9 each; \$7 for APWA members. My payment is enclosed.

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JOBS

MANAGING JOBS CASELOADS

*The Second Monograph in a Series
on Effective Case Management Practices
in the Job Opportunities and Basic
Skills (JOBS) Training Program*



*The Institute for Family Self-Sufficiency
of the American Public Welfare Association*



AMERICAN PUBLIC WELFARE ASSOCIATION

A. Sidney Johnson III, Executive Director

1/7

Kathn,

I want you to have
a pre-release copy of
our welfare reform report.

It adds some context
and details to our briefing
in November. Substantive
similarities between our
proposals remain intact,
as do our bipartisan
support.

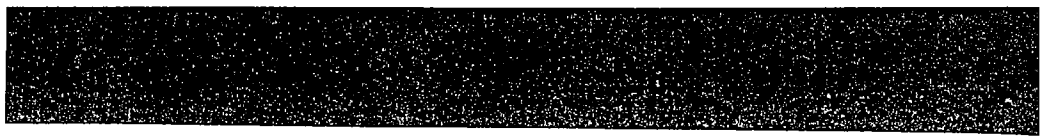
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► Responsibility

► Work

► Pride

*The Values of
Welfare Reform*

The American Public Welfare Association
810 First Street, N.E., Suite 500
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January 1994



APWA