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LAWTON CHILES
GOVERNOR

DEBORAH K. KILMER
DIRECTOR

WR-Florida

MEMORANDUM

TO: Bruce Reed

FROM: Debby Kilmer DKK

SUBJECT: Florida's New Welfare Law

DATE: June 6, 1996

Attached are summaries of Florida's new welfare proposal and the final bill which the Governor signed into law on May 16. The little green book is the PR document issued by the Legislature.

I told Governor Chiles of our conversation. He's aware that any existing waiver authority would not give Florida all they need to implement our new plan.........he's also aware that federal reform stands a better chance of succeeding than full Congressional approval of a Wisconsin "private relief bill"...........................esp out of the Senate. But, that doesn't mean his little brain cells aren't still working out some angle.............

Please call if you need any additional info...........HHS folks are quire familiar with our new plan........

attachments

The *W.A.G.E.S.* Program
Work and Gain Economic Self-Sufficiency
Brief Summary - Conference Report on CS/SB 1662
As Passed on May 3, 1996

Requires Work

- Adults are required to work or engage in work activities as a condition of receiving benefits. Weekly work hours will be the value of cash assistance and food stamps divided by the minimum wage, but not more than 40 hours per week.

- People who don't comply with work requirements will face immediate sanctions. In some circumstances, protective payees may be assigned to manage funds for children of parents who fail to comply.

Makes Work Pay

- The rules are changed to remove penalties for working and to provide incentives that encourage employment.

- Participants can accrue savings to assist in the transition to work and reduce returns to welfare.

- Provides employer incentives to encourage job creation and retention.

Time Limits

- Lifetime limit of 48 months.

- For most, there is a 24 month time limit out of any 60 consecutive months.

- For long term recipients with poor job skills or limited education, the time limit is 36 months out of 72 months, but not more than 48 months overall.

- Hardship exemptions limited to 10% of caseload in first year, 15% in second year and 20% for third and future years.

- Child-only cases (children living with Grandparents or other extended family members) are not subject to time limits or work requirements.

Child Care

- Transitional child care available for to 2 years after participants earn their way off temporary cash assistance. Copay based on sliding scale.

- Children of *WAGES* participants, children at risk of abuse or neglect and children of low income working families receive priority for child care.

- Implements the Child Care Partnership Act to promote child care for working families and provide incentives for employers to make contributions which can be matched by public funds to create a child care purchasing pool.

Child Support Enforcement

- Requires cooperation with child support enforcement as a condition of WAGES program eligibility.

- Toughens garnishment and paternity testing laws.

- Creates a Commission on Responsible Fatherhood to promote strategies that encourage responsible fatherhood and which should be recognized, expanded or replicated.

Teen Pregnancy Prevention and Teen Parent Requirements

- Local *WAGES* Coalitions must create aggressive local programs to reduce teen pregnancy and out-of-wedlock births.

- Teen parents must live at home or under the supervision of a responsible adult and must stay in school.

Governance and Implementation

- Creates a business-dominated *WAGES* State Program Board and local *WAGES* Coalitions to guide implementation.

- Provides for phased implementation with policies that save money implemented first and then invested in program measures that require investment.

- Changes in work activity requirements and setting up *WAGES* Board and Coalitions can be implemented without federal legislation. Sweeping changes in program rules will be ready for implementation upon passage of federal welfare reform.

SENATE STAFF ANALYSIS AND ECONOMIC IMPACT STATEMENT

(This document is based only on the provisions contained in the legislation as of the latest date listed below.)

Date: March 12, 1996 Revised: 5/15/96

Subject: Welfare Reform

	Analyst	Staff Director	Reference	Action
1.	Lucy Hadi	Smith	WM	Favorable/CS
2.				
3.				
4.				
5.				

I. Summary:

The bill eliminates individual entitlement to public assistance and creates the Work and Gain Economic Self-sufficiency (WAGES) Program to replace the Aid to Families with Dependent Children and Job Opportunities and Basic Skills training programs. The WAGES program will make available employment assistance, temporary financial assistance, vocational education and training, subsidized child care and Medicaid to low income one-or two-parent families with minor children. The bill establishes a time limit of 24 months consecutive or cumulative out of a 60-month period with a lifetime limit of 48 months for receipt of public assistance, requires all recipients to work and imposes sanctions for noncompliance with program requirements.

This bill substantially amends, creates, repeals or reenacts the following sections of the Florida Statutes:

Amends:
Sections 11.50, 20.19, 39.044, 61.30, 61.11, 97.021, 194.013, 212.08, 230.2305, 239.249, 239.301, 240.35, 240.40685, 240.61, 246.50, 402.26, 402.27, 402.301, 402.3015, 402.302, 402.305, 402.3051, 402.313, 402.315, 402.33, 402.40, 402.45, 409.178, 409.185, 409.1855, 409.186, 409.2554, 409.2562, 409.2564, 409.2566, 409.2567, 409.2572, 409.259, 409.2598, 409.275, 409.295, 409.315, 409.355, 409.60, 409.25625, 409.325,409.3251, 409.328, 409.3282, 409.335, 409.345, 409.903, 409.910, 409.938, 409.942, 411.232, 411.242, 411.243, 415.504, 420.621, 420.625, 420.627, 421.10, 497.419, 772.102, 895.02, 921.0012, 943.05

Creates:
Sections 383.0112, 383.0113, 383.0114, 402.281, 402.313, 409.179, 409.25644, 409.25645, 414.015, 414.025, 414.0252, 414.026, 414.027, 414.028, 414.055, 414.065, 414.075, 414.085, 414.095,414.105, 414.115, 414.125, 414.13, 414.14. 414.15, 414.16, 414.17, 414.20, 414.21,

414.22, 414.23, 414.24, 414.25, 414.26, 414.27, 414.28, 414.29, 414.31, 414.32, 414.33, 414.34, 414.35, 414.36, 414.37, 414.38, 414.39, 414.40, 414.41, 414.42, 414.43, 414.44 and 414.45.

Repeals:
Sections 409.026, 409.029, 409.185, 409.1857, 409.211, 409.2345, 409.235, 409.2351, 409.255, 409.326, 409.327, 409.3284, 409.921, 409.922, 409.923, 409.924, 409.925, 409.926, 409.927, 409.928, 409.929, 409.930, 409.931, 409.932, 409.933, 409.934, 409.935, 409.936, 409.937, 409.939, 409.940, 409.941, 409.943, 414.01, 414.02, 414.03, 414.04, 414.05, 414.06, 414.07, 414.08, 414.09, 414.10, 414.11 and 414.12.

II. Present Situation:

A. Entitlement to Welfare
The Aid to Families with Dependent Children Program (AFDC) was created in 1935 to provide temporary assistance for families with dependent children that are deprived of the principal wage earner by absence, death or disability. As a result of court action over the years, AFDC has evolved into an entitlement for individuals to all benefits available through the AFDC program and other related components of the Social Security Act including cash assistance, free or subsidized child care, Medicaid and child support enforcement. When benefits are denied or modified, the recipient is entitled to advance notification and to appeal the denial or modification.

B. Time Limits
A family's eligibility for AFDC and related benefits ends when the youngest dependent child reaches age 18 or when the family no longer meets financial eligibility requirements.

C. Work Requirements, Work Activities and Sanctions
Under provisions of the federal Jobs and Basic Skills Training Program (JOBS), at least 20% of nonexempt families must be engaged in work or work-related activity. Exempt from JOBS requirements are parents whose youngest child is under age three, persons who are ill, incapacitated or must care for someone who is ill or incapacitated. Unless the state guarantees child care availability and requires no more than 20 hours of work per week, parents with children under age six are also exempt. Because of the exemptions, less than 9% of the AFDC families in Florida are involved in JOBS programs through Project Independence.

Participation rates are calculated for each month. In calculating the participation rate, the Department of Health and Rehabilitative Services (HRS) counts persons whose average hours in JOBS activities during the month equal 20 hours per week.

JOBS programs include: Assessment (one month); education activities including high school or equivalent education, basic and remedial education, and education for those with limited English proficiency; jobs skills training; job readiness activities including job development, job placement and job search (eight weeks); on-the-job training; community work experience and postsecondary education. There is no time limit or participation limit on education or training services.

For failure to meet JOBS requirements without good cause, AFDC benefits may be denied to the offending parent and payments for the children can be made to a third party. Sanctions are subject to the "fair hearing" process.

D. Eligibility, Income Disregards and Benefits
Minor children and their custodial parent(s) are eligible if they have been denied the financial support of one parent through absence, death or disability, have assets excluding their home and personal property valued at no more than $1,000 including the market value of a vehicle in excess of $1,500, and have income below 31% of the federal poverty level. A portion of the income of a stepparent is included in calculating AFDC eligibility. For AFDC recipients with earned income, the first $30 plus one-third of the remainder is disregarded in calculating the benefit amount.

When eligibility is determined for AFDC, applicants are advised of other types of assistance for which they qualify and can apply for those as well. All nonexempt individuals are referred to Project Independence (Department of Labor and Employment Security) for services under the JOBS program. Referral is made to Child Support Enforcement (Department of Revenue) for establishment or enforcement of support orders.

E. Diversion and Emergency Assistance
No diversion services or activities are part of the current welfare system. Emergency assistance to aid families in meeting housing/shelter emergencies is available. Each family may receive only one monthly rent or mortgage payment in a 12-month period.

F. Child Care
The state must guarantee the availability of child care to AFDC clients if participation in employment programs is mandatory. Pursuant to federal law and s. 402.3015, FS, priority for subsidized child care slots must be given to AFDC recipients. There are currently approximately 61,000 subsidized child care slots administered by the Department of Health and Rehabilitative Services (HRS) of which 10,800 (17.7%) are being used by children whose parents are involved in Project Independence. Subsidized child care must be available for 10 hours each day on 261 days each year.

Providers under the subsidized child care program are reimbursed through community coordinating agencies (central agencies) at the same average rate whether or not they have been licensed or registered by HRS or another approved regulating agency. The reimbursement rate is set at the 75th percentile of the prevailing market rate for specific types of care.

The prekindergarten early intervention program operated by the district school boards provides child care services to economically disadvantaged three and four-year-old children for six hours a day, 180 days per year, but can be extended for up to 261 days at the option of the local school district. The per child rate for prekindergarten programs is set independent of the reimbursement rate for subsidized child care provided to children of the same age.

G. Transitional and Support Services

Transitional child care is provided for up to 24 months for children of families that have become ineligible for AFDC due to higher income. Approximately 16,700 children (27.4%) in subsidized child care are from these welfare transition families. In addition to subsidized child care, families that transition from welfare to work are eligible for up to an additional 12 months of Medicaid coverage.

H. Child Support Enforcement

Unmarried persons who are receiving public assistance are required under provisions of s. 409.2572, FS, to fully cooperate with efforts to establish paternity for their dependent children, establish a legal obligation by the father for child support and collect child support for their child. Persons who do not cooperate are subject to having their needs excluded from the public assistance grant.

The Child Support Enforcement program of the Department of Revenue is authorized to ask the court to deny or suspend licenses, registration or certificates including the following: Teaching certificates (Chapter 231, FS); child care facility licenses, day care licenses or registrations (Chapter 409, FS); health care practitioner licenses (Chapter 455, FS); licenses issued by the Department of Business and Professional Regulation pursuant to s. 20.165, FS; and commercial vessel licenses (s. 327.031, FS).

I. Fraud

Any person who provides false or misleading information for the purpose of becoming eligible for public assistance or who intentionally fails to provide information that could impact the amount of public assistance received or who knowingly participates in the unlawful transfer, traffic, forgery or possession of food stamps, Medicaid eligibility identification or benefits of other federally funded assistance program is guilty of fraud. The Department of Health and Rehabilitative Services is required under s. 409.325 and s. 409.326 to refer all cases in which fraud is suspected to the Office of the Auditor General, Division of Public Assistance Fraud.

J. Governance and Administration

The Department of Health and Rehabilitative Services (HRS) is assigned responsibility under Chapter 20.19, FS, to administer Aid to Families with Dependent Children (AFDC) and other related programs. HRS contracts with the Department of Labor and Employment Security for delivery of federal JOBS program services through Project Independence.

K. Family Transition Program

During its 1993 session, the Florida Legislature passed the Family Transition Act, Chapter 93-136, Laws of Florida, that authorized the Department of Health and Rehabilitative Services (HRS) to seek waivers from the U. S. Department of Health and Human Services for the purpose of implementing a welfare-to-work program through two pilot demonstration sites in urban areas. In demonstration projects established in Alachua (voluntary participation) and Escambia (mandatory participation) counties, HRS implemented the following welfare-to-work transition features:

1. Time limits on receipt of AFDC (24 months in any 60-month period) with limited opportunities for hardship exemptions,
2. Comprehensive family-centered case management,
3. Higher earned income disregards (First $200 plus 50% of remainder),
4. Higher asset limits ($5,000 plus value of a vehicle up to $8,500),
5. Disregard of stepparent income for up to six months,
6. Transitional child care for up to 24 months after AFDC eligibility ends. An income-based fee is charged during the second year,
7. "Bootstrap" training for skills enhancement made available for persons who leave AFDC due to employment,
8. "Learnfare" in which AFDC benefits are suspended if a dependent child accumulated excessive school absences or the parent fails to visit with the child's teacher.
9. Immunization of all dependent children is required within 12 months; AFDC grant is reduced for noncompliance, and
10. Incentive payments for employers to encourage employment of hard-to-place clients.

A two-phase evaluation of the Family Transition Program(FTP) was required by statute. The initial phase of the evaluation performed by Manpower Demonstration Research Corporation suggested the following:

1. Time limits are essential, but the 60-month time limit may be too long.
2. Most participants should be required to participate in work activities first rather than assigned to training, the exception being individuals who lack basic literacy skills.
3. Higher earned income disregards and asset limits appear to encourage work and saving.
4. Extended transitional child care appears to encourage employment.
5. Learnfare appears to have a positive impact on child school attendance and is supported by the county school system.

During FY1995-96, HRS expanded the Family Transition Program to six additional sites. No evaluative data is available from these new sites at this time.

III. Effect of Proposed Changes:

A. <u>Entitlement to Welfare</u>

This bill eliminates the individual entitlement to AFDC and other related forms of assistance.

B. <u>Time Limits</u>

This bill imposes a limit of 24 months consecutive or cumulative within a 60-month period and a 48-month lifetime limit for receipt of temporary family assistance. Long-term welfare recipients with limited skills and little work experience are eligible for up to 36 months consecutive or cumulative within a 72-month period, but are still subject to the 48-month lifetime limit.

Exempted from time limits are minor children, including teen parents up to age 19, and individuals who are eligible for Supplemental Security Income benefits due to age or disability. Teen parents are eligible to receive up to an additional 12 months of temporary assistance after their nineteenth birthday.

"Hardship" exemptions from the time limits for up to a total of 12 months may be available for individuals who have diligently participated in all program activities and complied with all program requirements but have been unable to find employment. The cumulative total of months in which any individual may receive temporary assistance, including the "hardship" months, will not exceed 48 months. The number of hardship exemptions will be limited to no more than 10% of the assistance caseload in the first year, 15% in the second year and 20% in the third year and all successive years.

C. Work Requirements, Work Activities and Sanctions

This bill requires at least one adult in each participating family to be engaged in work or an approved work-related activity for the maximum number of hours each week permitted by federal law, but no individual can be required to work more than 40 hours. Approved work activities include: Unsubsidized employment, subsidized employment, community service employment, job-search/job readiness (limited to four weeks), job-skills training, on-the-job training and education services for persons under age 20 who have not completed high school. Vocational education or training can only be counted as a person's primary work activity for 12 months. No more than 20% of the caseload can be engaged in vocational education or training as the primary work activity at any given time.

The WAGES Program State Board is required to develop a performance-based payment structure to be used for all WAGES program services that takes into account the degree of difficulty associated with placing a WAGES Program participant in a job, the quality of the placement with regard to salary, benefits and advancement opportunities and the employee's retention of the placement. The payment structure will not provide more than 40% of the cost of services prior to placement, 50% upon employment placement and the remaining 10% if employment is retained for at least six months. This payment structure will also be applied to vocational and technical education and training provided to WAGES participants.

Persons who are placed in unsubsidized employment or subsidized employment will receive salary and benefits associated with their positions. Persons who are placed in community service jobs or who are assigned to education, training or job readiness will receive pay after performance. Under this arrangement, the total amount of assistance received by the family will be divided by number of work hours in the month. The resulting amount is the hourly wage to be paid the recipient if all required activities during the month are completed. If the participant fails to complete all requirements, the benefit amount will be adjusted on a pro rata basis. Example: Family cash assistance grant is $400 per month. $400/160hrs = $2.50

per hour. Parent works 35 hours each week for total of 140 hours. "Pay after performance" wage: 140 X $2.50 = $350.

Incentives are available to encourage employers to hire WAGES program participants. However, an employer who receives an incentive payment is expected to retain the WAGES program participant for at least 12 months. If the employee is dismissed at any time within 12 months after termination of the incentive payment, the employer will be required to repay some or all of the incentive received.

Minor children, parents with children under three months of age, caretakers whose needs are not included in determining the family's eligibility and individuals who are eligible for Supplemental Security Income benefits due to age or disability are exempt from complying with work requirements.

Failure to comply with work requirements results in loss of income from wages or pay after performance. For the second incident of noncompliance, benefits including food stamps will be suspended until compliance has been achieved for 30 days. For the third incident, benefits will be lost for three months. Prior to sanction for the second noncompliance being imposed, a member of the WAGES program staff will interview the participant to determine why compliance has not been achieved and, if appropriate, will refer the participant for services that could assist with achieving compliance.

Upon the second or third occurrence of noncompliance, assistance for children under age 12 in the family may be continued through a protective payee designated by the Department of Health and Rehabilitative Services if it is determined by Children and Family Services staff to be in the children's best interest.

D. Eligibility, Disregards and Benefits

Minor children and their parent(s) are eligible to participate in the WAGES Program if they have assets, excluding their home and personal property, valued at no more than $2,000 plus vehicles required for education or employment the cumulative value of which may not exceed $8,500, and have income below 31% of the federal poverty level. The income of a stepparent will be excluded in calculating eligibility. For WAGES participants with earned income, the first $200 plus one-half of the remainder will be disregarded in calculating the benefit amount.

Application or reapplication for public assistance will be made at a one-stop career center (Jobs and Benefits Office or other such facility approved by the Jobs and Education Partnership). Applicants will be screened for work history as an indicator of early employability and, if employable, will be referred to the Jobs and Education Regional Board. Teen parents, children who are not living with their parents and incapacitated individuals will be referred to appropriate service providers.

E. Diversion and Emergency Assistance

All families who apply for assistance through the WAGES program will be screened to determine if provision of one-time or short-term services could assist them in obtaining or maintaining employment and prevent them from entering the welfare caseload. Diversion services can include cash, vouchers or in-kind benefits such as shelter or utility payments, car repair assistance or emergency food assistance. Assistance is limited to no more than the amount the family would be eligible to receive for a 2-month period under the WAGES program. If a family that receives diversion assistance applies for assistance again within three months, the amount of the diversion assistance will be prorated and deducted from any future assistance they receive.

F. Child Care

This bill provides a differential rate for child care provided in unlicensed or informal settings. The reimbursement rate for such care cannot exceed 50% of the rate paid for child care provided in licensed settings. Community coordinating child care agencies (central agencies) will be selected by competitive procurement at least once every three years. All child care would be subject to payment of income-based fees.

In terms of child care standards, the bill creates a "Gold Seal" level of quality but does not provide for a related rate enhancement. The Department is authorized to develop standards for voluntary licensure of family day care homes. The bill states as legislative intent that family day care homes should be charged residential rather than commercial utility rates and exempts family day care homes from the sales tax on utilities.

The Department of Health and Rehabilitative Services and other regulating agencies will develop procedures for an abbreviated inspection that would be used for facilities that have had no serious (Class 1 or 2) licensure deficiencies for two consecutive years. Outdoor play area space requirements for children under 12 months of age are eliminated; however, the reduction in space requirements is offset by increased availability of age-appropriate play equipment.

Prekindergarten early intervention programs provided through the public school system will be required to cooperate with local interagency child care councils in creating a "single point of entry" for early childhood services. Further, interagency councils are required to determine which current participants in Prekindergarten programs need extended day services and identify how many students who are eligible for enrollment are not enrolled in Prekindergarten programs because of the current hours/days of availability. Public school systems are required to report to the Legislature by March 1, 1997, the success of their efforts to meet the needs of current and potential Prekindergarten students for extended hours/days of availability.

The Child Care Partnership Act is amended to create a Child Care Executive Partnership program for developing flexible local partnerships with employers that extend child care to the working poor. Child Care purchasing pools may be created through community child care coordinating agencies in which state and federal funds will be matched dollar for dollar with funds contributed by employers, local governments and others.

G. <u>Transitional and Support Services</u>
This bill makes child care available for up to 24 months for children of families that become ineligible for WAGES program benefits as a result of earnings. Medicaid benefits will be available for up to 12 months for families that become ineligible for WAGES program benefits as a result of higher income and who are unable to get affordable health insurance through their employers. Other support services including transportation, tools, uniforms and personal or family counseling (including substance abuse treatment) may be provided if necessary for employment or employment-related training.

"Bootstrap" training may be available for WAGES program participants who secure and retain employment if it is necessary to enhance their job skills or to prepare them for advancement.

H. <u>Child Support Enforcement</u>
This bill makes cooperation with child support enforcement an eligibility requirement for participation in the WAGES program. No benefits will be available to the family until child support enforcement cooperation requirements are met.

Non-custodial parents who have not met their child support obligations will be unable to apply for food stamps and could be ordered by the court to go to work. In addition to denial or revocation of professional licenses as provided in current law, this bill makes it possible for the court to deny recreational hunting and fishing licenses to non-custodial parents who have not met their child support obligations.

This bill authorizes the Department of Revenue to institute one or more pilot programs in which administrative rather than judicial processes would be used to secure uncontested orders for genetic testing to establish paternity and for establishment of support orders. The Department of Revenue is also authorized to levy on personal property and credits, excluding wages, of individuals who are delinquent with child support payments and to intercept state warrants issued to those individuals.

I. <u>Fraud Prevention and Reduction</u>
This bill directs the Department of Health and Rehabilitative Services to create an error-prone case profile in the information systems that support economic services programs and to develop automated programs necessary to compare each application for public assistance to the error-prone case profile. Each application that meets the error-prone case profile must be investigated prior to the issuance of program benefits.

The bill also extends the area of responsibility given to the Auditor General's Division of Public Assistance Fraud.

J. Governance and Administration

This bill creates a WAGES Program State Board the membership of which is balanced with regard to geography, gender and ethnicity, under the direction of a private sector business leader and gives it responsibility to develop a comprehensive implementation plan including a resource allocation strategy, to charter and charge local WAGES Coalitions and to monitor and report progress in implementing the WAGES program.

Implementation of the WAGES program at the community level will be under the leadership of local WAGES coalitions. At least one-half of the membership of each local coalition will be from the business community. The coalitions will also include a representative of a grass-roots economic development organization that serves the poor. Service providers that could benefit from WAGES program resources will not be represented on the local coalitions. Members of the board of public or private educational institutions are also excluded from coalition membership, however, county government representative(s) may participate as ex officio members.

The service delivery "front door" for the WAGES program will be "one-stop" centers operated either by Department of Labor and Employment Security or through Jobs and Education Regional Boards. Staff of the Department of Health and Rehabilitative Services will be collocated in the one-stop centers for temporary family assistance, subsidized child care and other social and economic services. Vocational education and training services will be provided through the Jobs and Education Partnership of Enterprise Florida, Inc., pursuant to performance-based agreements.

K. Teen Pregnancy Prevention

The bill creates the Teen Pregnancy Prevention Community Initiative to encourage local communities to implement aggressive strategies that reduce teen pregnancy through a combination of educational, social, and criminal justice strategies.

L. Implementation

The effective date for CSSB1662 is July 1, 1996, or upon certification by the Governor that H.R.4 , the Personal Responsibility and Work Opportunity Act, or similar federal legislation has been enacted. However, the Governor is authorized to implement the WAGES Program in phases with provisions that save money being implemented before those that have associated cost. The executive branch is directed to seek state plan amendments and waivers as necessary and practical to implement the WAGES Program as quickly as possible consistent with phase-in priorities.

IV. Constitutional Issues:

A. Municipality/County Mandates Restrictions:

None.

B. Public Records/Open Meetings Issues:

None.

C. Trust Funds Restrictions:

None.

D. Other Constitutional Issues:

V. Economic Impact and Fiscal Note:

A. Tax/Fee Issues:

None.

B. Private Sector Impact:

C. Government Sector Impact:

This fiscal analysis assumes passage of welfare reform legislation that provides states with block grant funding, policy flexibility and additional child care funding. Further, this analysis assumes that provisions of the WAGES Program that save money will be implemented before those that have associated cost. With block grant funding, Florida would be able to retain and reapply savings achieved through welfare-to-work caseload reductions. Without federal welfare reform that alters the current entitlement character of welfare programs, Florida will not be able to retain federal funds saved through employment programs and will be limited in the degree to which WAGES program reforms with associated costs can be implemented.

Projected Savings:

A. Work Requirements and Diversion

Implementation of the WAGES program work requirements is expected to result in an AFDC caseload reduction as individuals who currently receive AFDC elect not to reapply and those who would have applied previously choose not to apply. In addition, diversion services and activities are expected to further reduce the caseload by helping families avoid welfare dependence.

Fund	*General Revenue*	*Trust Funds*	*Total*
Projected Savings:	*($20,954,456)*	*($24,214,332)*	*($45,168,788)*

B. *Sanctions and Program Limitations*

It is anticipated that some current AFDC recipients will not comply with WAGES program requirements related to work, child support enforcement, Learnfare and child immunization. Sanctions imposed for noncompliance will result in benefit payment savings.

Fund	***General Revenue***	***Trust Funds***	***Total***
Projected Savings:	**($2,494,120)**	**($3,141,063)**	***($5,635,183)***

C. *Policy Changes*

Federal welfare reform legislation includes both mandatory and optional policy changes that will substantially reduce welfare system cost. This analysis assumes that Florida will implement all the mandatory policy changes and will exercise its option regarding other policy changes that can reduce welfare cost.

Fund	***General Revenue***	***Trust Funds***	***Total***
Projected Savings:	***($63,518,947)***	***($80,463,914)***	***($143,982,861)***

D. *Maximize Available Federal Funding*

Federal welfare reform legislation would make available more federal financial participation in FY 1996-97 than Florida is currently receiving. General revenue savings would result from fully utilizing all available federal funding.

Fund	***General Revenue***	***Trust Funds***	***Total***
Projected Savings:	***($7,446,499)***	***($27,230,674)***	***($34,677,173)***

Total Projected Savings

Fund	***General Revenue***	***Trust Funds***	***Total***
Projected Savings:	***($94,414,022)***	***($135,049,983)***	***($229,464,005)***

WAGES Program Costs:

A. ***Work Programs, Requirements and Incentives***
There are costs associated with implementing WAGES program work requirements whether participants are placed in unsubsidized jobs, subsidized jobs or community service. These costs include transportation, tools, uniforms and, when required, substance abuse treatment.

Fund	***General Revenue***	***Trust Funds***	***Total***
Projected Cost:	***$22,734,819***	***$22,801,901***	***$45,536,720***

B. ***Child Care***
This analysis assumes that licensed and exempt child care slots will be reimbursed at an average rate of $3,400 per year and that unlicensed or informal child care slots will be reimbursed at the rate of $1,700. Currently, unlicensed slots comprise no more than 7% of all child care slots. Assuming this percentage remains constant, CSSB1662 provides funds to serve at least 18,188 additional children in licensed or exempt subsidized child care slots and an additional 5,000 children in unlicensed and informal child care slots.

Fund	***General Revenue***	***Trust Funds***	***Total***
Projected Cost:	***$ 0***	***$54,046,487***	***$54,046,487***

C. ***Incentives for Marriage***
CSSB1662 eliminates current welfare policies that treat low-income two-parent families and stepparent families differently from single-parent families and, in so doing, provides incentives for the creation of two-parent families.

Fund	***General Revenue***	***Trust Funds***	***Total***
Projected Cost:	***$23,913,513***	***$30,140,540***	***$54,054,053***

D. ***Fraud Prevention and Reduction***
This bill requires all agencies involved in delivering WAGES program services to implement aggressive, technology-based strategies to prevent, detect and eliminate fraud. Savings projected from implementation of aggressive fraud prevention and reduction efforts were incorporated in the FY1996-97 General Appropriations Act.

Fund	*General Revenue*	*Trust Funds*	*Total*
Projected Cost:	*$ 8,736,372*	*$ 8,736,372*	*$ 17,472,744*

E. ***Reducing Teen Pregnancy and Out-of-Wedlock Births***
Investments in abstinence education, pregnancy prevention and intensive services for teen parents and their children are expected, over time, to significantly reduce the number of families that require public assistance.

Fund	*General Revenue*	*Trust Funds*	*Total*
Projected Cost:	*$ 2,885,359*	*$ 7,115,905*	*$10,001,264*

F. ***Special Needs Allowance for Disabilities***
Provides an allowance in the eligibility determination process for families that, as a result of a mandatory federal policy change, lose the current disregard of SSI income and are significantly impacted by costs associated with a disabled family member.

Fund	*General Revenue*	*Trust Funds*	*Total*
Projected Cost:	*$4,400,000*	*$5,600,000*	*$10,000,000*

The net projected fiscal impact attributable to CS/SB1662 is as follows:

Fund	*General Revenue*	*Trust Funds*	*Total*
Projected Savings:	*($94,414,022)*	*($135,049,983)*	*($229,464,005)*
Projected Cost:	*$62,670,063*	*$128,441,205*	*$191,111,268*
Net Fiscal Impact:	*($31,743,959)*	*($ 6,608,778)*	*($38,352,737)*

VI. Technical Deficiencies:

None.

VII. Related Issues:

None.

VIII. Amendments:

None.

This Senate staff analysis does not reflect the intent or official position of the bill's sponsor or the Florida Senate.

Clinton Presidential Records
Digital Records Marker

WR Florida

A Plan to Reform Welfare in Florida

WAGES

Work And Gain Economic Self-Sufficiency

The Florida Legislature

Conference Committee on Welfare Reform
CSSB 1662

May 1996

WR - Florida

Florida Makes Welfare Work
Summary of Work and Gain Economic Self-Sufficiency (WAGES) Welfare Reform Legislation
May, 1996

History

Under the leadership of Governor Lawton Chiles, Florida has been testing a sweeping, time-limited, welfare reform plan that promotes the independence of work over dependence on government. In 1994, the state started Family Transition Program welfare reform pilot projects in Escambia and Alachua counties. The Escambia pilot was mandatory for AFDC participants, the Alachua pilot was voluntary.

The Family Transition Program limited AFDC benefits to two years for most recipients and three years for some with special needs. The pilot programs proved to be successful in helping people move from welfare to work.

After review, the mandatory pilot was deemed the most effective in bringing positive change to Florida's welfare system. Florida's welfare reform pilots have helped meet the real life needs of participants by providing poor mothers with the day care, health care, education and job training they need to achieve financial independence from welfare. In 1995, Governor Chiles expanded the mandatory pilot program to six additional sites in Duval, Lee, Orange, Pinellas, St. Lucie and Volusia counties.

During his 1996 State of the State Address, Governor Chiles challenged the Legislature to "turn welfare applications into job applications" and pass a strong, bipartisan welfare reform plan. On May 3, 1996, the Legislature passed the Work and Gain Economic Self-sufficiency (*WAGES*) bill. Governor Chiles praised the legislation for making Florida the largest state in the nation to encourage "work and productivity over welfare" and pledged to sign the legislation into law.

Requires Work

- Adults are <u>required to work</u> or engage in work activities as a condition of receiving benefits. Weekly work hours will be the value of cash assistance and food stamps divided by the minimum wage, but not more than 40 hours per week.

- People who don't comply with work requirements will face <u>immediate sanctions.</u> In some circumstances, protective payees may be assigned to manage funds for children of parents who fail to comply.

Makes Work Pay

- The rules are changed to remove penalties for working and to provide incentives that encourage employment.
- Participants can accrue savings to assist in the transition to work and reduce returns to welfare.
- Provides employer incentives to encourage job creation and retention.

Time Limits

- Lifetime limit of 48 months.
- For most, there is a 24-month time limit out of any 60 consecutive months.
- For long-term recipients with poor job skills or limited education, the time limit is 36 months out of 72 months -- but not more than 48 months overall.
- Hardship exemptions limited to 10% of caseload in first year, 15% in second year and 20% for third and future years.
- Child-only cases (children living with Grandparents or other extended family members) are not subject to time limits or work requirements.

Child Care

- Transitional child care available for to 2 years after participants earn their way off temporary cash assistance. Copay based on sliding scale.
- Children of *WAGES* participants, children at risk of abuse or neglect and children of low income working families receive priority for child care
- Implements the Child Care Partnership Act to promote child care for working families and provide incentives for employers to make contributions which can be matched by public funds to create a child care purchasing pool.

Child Support Enforcement

- Requires cooperation with child support enforcement as a condition of WAGES program eligibility.

- Toughens garnishment of paternity testing laws.

- Creates a Commission on Responsible Fatherhood to promote strategies that encourage responsible fatherhood and which should be recognized, expanded or replicated.

Teen Pregnancy Prevention and Teen Parent Requirements

- Local *WAGES* Coalitions must create aggressive local programs to reduce teen pregnancy and out-of-wedlock births.

- Teen parents must live at home or under the supervision of a responsible adult and must stay in school.

Governance and Implementation

- Creates a business-dominated *WAGES* State Program Board and local *WAGES* Coalitions to guide implementation.

- Provides for phased implementation with policies that save money implemented first and then invested in program measures that require investment.

- Changes in work activity requirements and setting up *WAGES* Board and Coalitions can be implemented without federal legislation. Sweeping changes in program rules will be ready for implementation upon passage of federal welfare reform.

Contingency Funding/Flexibility

- The Working Capital Fund may be used to implement the *WAGES* program during fiscal year 1996-97 when the requirements of the program exceed the amount of funds available. Budget flexibility is provided for the transfer of funds between appropriation categories, budget entities and departments as necessary.

WR FL

STATE OF FLORIDA
Office of the Governor
THE CAPITOL
TALLAHASSEE, FLORIDA 32399-0001

LAWTON CHILES
GOVERNOR

FOR IMMEDIATE RELEASE:
April 23, 1997

CONTACT: April Herrle or
Karen Pankowski
(904) 488-5394

GOVERNOR CHILES SUES FEDERAL GOVERNMENT OVER WELFARE REFORM RESTRICTIONS ON LEGAL NON CITIZENS

TALLAHASSEE -- On behalf of the State of Florida, Governor Lawton Chiles today filed suit against the United States Government seeking relief from changes in federal welfare laws that restrict essential federal benefits for many legal non citizens in Florida. Under the 1996 welfare reform law, an estimated 100,000 legal immigrants in Florida -- many of whom are elderly or disabled -- will lose one or more federal benefits that help pay for food and other basic living expenses.

"The looming crisis that we are facing is not the result of true welfare reform. Rather, it stems from a veiled attempt by Congress to balance the federal budget on the backs of Florida taxpayers," Governor Chiles said. "These cuts are cruel and will go directly to the heart of our state's communities. Congress must act to correct this basic unfairness and until it does, this suit will keep the focus where is should be -- at the federal level."

FLORIDA'S CASE

Florida's suit against the U.S. Government, Health and Human Services Secretary Donna Shalala, Social Security Administration Acting Commissioner John Callahan and Agriculture Secretary Dan Glickman is being filed today in federal court in Miami. Florida's suit alleges that the 1996 Welfare Reform Act:

- violates the due process clause of the 5th Amendment of the United States Constitution by denying equal protection to legal non citizens with disabilities by terminating Supplemental Security Income (SSI) and food stamp benefits;

- violates an agreement with the Social Security Administration to reimburse Dade County for interim assistance paid to legal non citizens;

- violates Article IV and the 10th Amendment of the United States Constitution by forcing Florida to assume the costs of caring for the individuals losing benefits; and

(more)

- violates basic constitutional principles by discriminating against legal non-citizens. The declared purpose, to encourage self-sufficiency and discourage illegal immigration, is irrational since many affected non citizens were already residing in the United States when welfare reform was enacted.

PLAINTIFFS TO LAWSUIT

Along with Governor Chiles, the other governmental plaintiffs in the case are: Attorney General Bob Butterworth; Florida Department of Children & Family Services Secretary Ed Feaver; Florida Agency for Health Care Administration Director Doug Cook and Dade County Mayor Alex Penelas. In addition to local and state agencies suing the federal government, two people representing the class of individual plaintiffs also joined Governor Chiles:

- Rafael Caramanzana -- A 32-year-old who was born with severe brain damage and cerebral palsy and immigrated to the U.S. in 1983 with his parents and is a lawful permanent resident. Caramanzana has quadriplegia and does not have any motor skills. His mother cares for him and his father works in a factory and has a pre-tax income of $220 a week. The father's income and Caramanzana's SSI benefits provide the household's only income. The family has applied for citizenship for Caramanzana, but he has been rejected due to mental impairments.

- Eduardo Marsans -- A 21-year-old who has been a lawful permanent resident of the U.S. since 1993. Marsans suffers from cerebral palsy and quadriplegia and receives SSI and related food stamps. This assistance helps Marsans' family pay rent and buy food. Because he has not lived in the U.S. for five years, Marsans is not eligible for naturalization until May, 1998. His benefits will be terminated unless he submits proof of his continued eligibility for SSI by May 12, 1997.

LEGAL REMEDIES

In the suit, Florida is asking the Court to: declare that denying SSI and food stamp benefits to otherwise eligible lawful permanent resident aliens is unconstitutional and void; restore SSI and food stamp benefits to legal non citizens; declare that the Social Security Administration's rule is void because it is arbitrary and capricious, it was unlawfully promulgated and retroactively breached the agreement to reimburse entities for interim assistance.

(more)

Because of the 1996 changes in federal welfare law, Florida's state and local governments may have to fill the vacuum left by the elimination of federal assistance to some legal immigrants -- placing the burden on Florida's state and local taxpayers to pick up the yearly tab to serve needy legal immigrants who lose federal benefits. These changes could place a significant burden on the delivery of social services in Florida and are likely to impact services for elders, place a strain on public hospitals, increase health care costs and put more people on the streets.

FLORIDA'S EFFORTS TO DATE

Today's action follows a series of steps taken by Governor Chiles and Lt. Governor Buddy MacKay to protect Florida's taxpayers and ensure that critical federal benefits remain available to legal non citizens who have lived in Florida since welfare reform legislation was enacted.

- Extended Medicaid and Temporary Aid for Needy Families (TANF) coverage for all "qualified aliens" residing in Florida as of August 22, 1996.

- Extended food stamp eligibility until August, 1997 -- the maximum period allowed by the federal government.

- Naturalization assistance: developed self-help information packet to distribute to all elderly and disabled non citizens likely to loose federal benefits.

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WR-Florida

POLITICS & POLICY

Reviewing Welfare Cases in a Florida County, Frustrated Volunteers Cut Rolls as States Delay

By ROCHELLE SHARPE
Staff Reporter of THE WALL STREET JOURNAL

Welfare reform has spawned a new kind of jury system in Florida's Escambia County.

Before people get thrown off the welfare rolls there, panels of citizens review their cases and decide whether they should lose government aid. The volunteers say they try to judge with empathy, but usually wind up getting depressed and disgusted. They have voted to eliminate cash benefits for all 45 recipients who hit the two-year time limit as of last month and hadn't complied with the rules of a state pilot welfare-overhaul project being conducted in the county.

Cutting people off the rolls "doesn't bother me at all," says panelist Paul Blackman, a government investigator. Mr. Blackman says he originally wanted to participate on the panels to protect recipients' rights. But now he believes clients he sees get too much help from the state. "They are coddled," he complains.

By actually chopping people off welfare, the panels are doing what many state officials from governors to caseworkers have been reluctant to do so far under welfare overhaul. Nearly 40 states are seeking to exempt some adult food-stamp recipients from food-stamp cutoffs. At the same time, only a handful of states have taken the option, given to them by Congress last year, to cut off Medicaid and welfare to legal immigrants.

Certain Credibility

Charles Bates, district administrator of Florida's Department of Children and Families, says the action of the Escambia County panels "gives me a certain amount of public credibility that we wouldn't have without them. We're getting it from all the people who want to throw all the bums off [welfare] to people who think we're being cruel for what we're doing."

The panelists are supposed to be client advocates, making sure the government has given recipients every opportunity to cooperate with the program. Sometimes they take verbal abuse from clients, other times they give encouragement. Mainly, though, they get frustrated that most recipients don't even bother to attend the hearings. "You sit on one of these panels, and you go home very angry," says Emily Baird, a retired 75-year-old psychotherapist.

The volunteers' views are skewed by the fact that they review cases of only those who fail to follow the plans devised by their caseworkers. Besides imposing time limits on benefits and finding work, the experimental Family Transition Program gives recipients much more personal attention from caseworkers and offers more help with child care and transportation problems than under previous welfare programs.

Good Evaluation

Overall, the pilot project in Escambia County seems to be helping recipients find jobs and increase their pay, according to a preliminary evaluation released last week by Manpower Demonstration Research Corp., a New York-based nonprofit group. Participating in the program for 15 months increased the employment rate of recipients by 15% and their earnings by 15%, the group found. And their salaries kept rising. During the final 90 days of the study, those in the program earned 24% more than people in a control group, with employed participants making an average

But the program's successes aren't the focus of the seven-member panels. They typically review cases of recalcitrant recipients nine months after they enter the program and then nine months later if they are still having problems — usually voting at that time on terminating benefits.

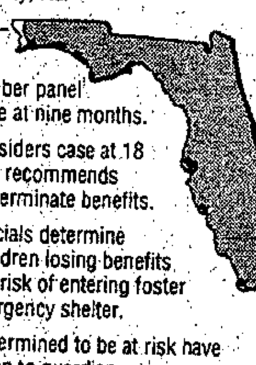
Some 65 volunteers from various walks of life rotate among seven panels, which were begun about three years ago. They conduct their 30-minute hearings like court proceedings. Sitting at a large table in the front of a room, they listen to a recipient's case manager and career adviser discuss the participant's behavior — dwelling on broken appointments and promises. Then, if the recipient is there, the panelists ask questions.

Sometimes, the clients, who are identified only by initials, resent the queries. "'Why do you want to know? It's none of your business,'" one woman hollered, recalls Doris Orvis, 47, a housewife who sits on panels. After one man became red-faced, screaming obscenities at the panel before he stormed out, Ms. Orvis says she started bringing her cellular phone to the hearings so she could call 911, if necessary.

Other recipients remain mute, responding to panelists only by nodding. Because many women seem intimidated by the proceedings, Carol Sasser, 51, a retired chemical operator, often focuses on putting them at ease. Once, she says, she discovered that a woman had trouble working because of back problems. The woman had never told her caseworker or sought medical treatment because she couldn't afford to see a doctor.

Cutting Off Welfare

Typical review process for recipients who don't comply with the Family Transition Program in Escambia County, Fla.



1. Seven-member panel reviews case at nine months.
2. Panel reconsiders case at 18 months and recommends whether to terminate benefits.
3. Welfare officials determine whether children losing benefits would be at risk of entering foster care or emergency shelter.
4. Children determined to be at risk have benefits given to guardian.

Source: Manpower Demonstration Research Corp.

But the review boards don't usually unearth such understandable explanations of why recipients have trouble participating in the program. "Some don't seem to be impressed by anything," says Dorene Angeles, 79, a former newspaper reporter. "It's rather discouraging to see people so lackadaisical about their futures."

Panelist Is Upset

Board members get disgusted by recipients who show up better dressed than they are, Ms. Orvis says. And one panelist who is on Social Security got upset when she realized that a participant was receiving twice as much government aid as she was.

When the panels must decide whether to terminate someone's welfare benefits, there's usually little debate. Some board members worry what will happen to the children of the clients, but Ms. Baird rationalizes her decisions, saying, "Maybe children are suffering more by learning to be dependent on taxpayers." The state reviews all of the panels' decisions and has the authority to reverse them, but has yet to do so. In three cases, though, it didn't terminate the children's benefits.

But panel members say they don't want to be in the business of just punishing people. Most say they want to inspire recipients and persuade them to take advantage of the program.

The best time to change attitudes is during a person's first hearing, panelists say. They try all sorts of methods to get through to participants, berating some while praising others.

"In 12 more months, there will be no more money," Ms. Orvis recalls another panelist saying to one recalcitrant woman. "What's going to happen to your kids? Who's their role model going to be?" The woman burst into tears and by the end of the session had signed up for her missed appointments, Ms. Orvis says.

In another case, William Bryant, 68, a retired computer analyst, recalls a listless woman who looked "ready for someone to beat her with gourds." Instead, he says, one panelist told her how smart she was, that her academic test scores were higher than hers. Board members also focused on all of the program's benefits, he says, and pointed out that if she took advantage of them, "she could win." By the end of the 30-minute session, he says, the woman left with a glisten in her eye.

THE WALL STREET JOURNAL
WEDNESDAY, APRIL 9, 1997

WR Florida

To: Bruce Reed/Cathy Mays

From: Michael Langton

Subject: President's Announcement of Goodwill's Welfare to Work Demonstration Project??

Date: October 17, 1996

MEMORANDUM

Goodwill's authorizing language is in the Personal Responsibility and Work Opportunity Reconciliation Act of 1996. See attached section.

Goodwill's $10 Million request has been provided for within the $44 Million under Social Services and Income Maintenance Research in Children and Families Services Program, in the Making Appropriations for the Department of Defense for Fiscal Year 1997 Conference Report to HR 3610. See attached sections.

Now the question arises: How do we get the President to announce Goodwill's Welfare to Work Demonstration Project during any upcoming visits to Florida or Louisiana in the next few weeks?

Please advise on how we could make this happen!

cc: Rich Tarplan, HHS

Post-it® Fax Note 7671	Date 10/17 # of pages ▸ 4
To Bruce Reed	From Mike Langton
Co./Dept.	Co.
Phone #	Phone # 904/387-3342
Fax # 202/456-5577	Fax #

104TH CONGRESS 2d Session | HOUSE OF REPRESENTATIVES | REPORT 104–725

PERSONAL RESPONSIBILITY AND WORK OPPORTUNITY RECONCILIATION ACT OF 1996

CONFERENCE REPORT

TO ACCOMPANY

H.R. 3734

JULY 30, 1996.—Ordered to be printed

U.S. GOVERNMENT PRINTING OFFICE
WASHINGTON : 1996

28–266

otherwise), the percentage that has health insurance provided by an agency of government, and the percentage that does not have health insurance.

"(G) The average income of the families of the members of each group.

"(H) Such other matters as the Secretary deems appropriate.

"(h) FUNDING OF STUDIES AND DEMONSTRATIONS.—

"(1) IN GENERAL.—Out of any money in the Treasury of the United States not otherwise appropriated, there are appropriated $15,000,000 for each of fiscal years 1997 through 2002 for the purpose of paying—

"(A) the cost of conducting the research described in subsection (a);

"(B) the cost of developing and evaluating innovative approaches for reducing welfare dependency and increasing the well-being of minor children under subsection (b);

"(C) the Federal share of any State-initiated study approved under subsection (f); and

"(D) an amount determined by the Secretary to be necessary to operate and evaluate demonstration projects, relating to this part, that are in effect or approved under section 1115 as of September 30, 1995, and are continued after such date.

"(2) ALLOCATION.—Of the amount appropriated under paragraph (1) for a fiscal year—

"(A) 50 percent shall be allocated for the purposes described in subparagraphs (A) and (B) of paragraph (1), and

"(B) 50 percent shall be allocated for the purposes described in subparagraphs (C) and (D) of paragraph (1).

"(3) DEMONSTRATIONS OF INNOVATIVE STRATEGIES.—The Secretary may implement and evaluate demonstrations of innovative and promising strategies which—

"(A) provide one-time capital funds to establish, expand, or replicate programs;

"(B) test performance-based grant-to-loan financing in which programs meeting performance targets receive grants while programs not meeting such targets repay funding on a prorated basis; and

"(C) test strategies in multiple States and types of communities.

"(i) CHILD POVERTY RATES.—

"(1) IN GENERAL.—Not later than 90 days after the date of the enactment of this part, and annually thereafter, the chief executive officer of each State shall submit to the Secretary a statement of the child poverty rate in the State as of such date of enactment or the date of the most recent prior statement under this paragraph.

"(2) SUBMISSION OF CORRECTIVE ACTION PLAN.—Not later than 90 days after the date a State submits a statement under paragraph (1) which indicates that, as a result of the amendments made by section 103 of the Personal Responsibility and Work Opportunity Reconciliation Act of 1996, the child poverty rate of the State has increased by 5 percent or more since the

104TH CONGRESS
2d Session

HOUSE OF REPRESENTATIVES

REPORT
104–863

MAKING APPROPRIATIONS FOR THE DEPARTMENT OF DEFENSE FOR FISCAL YEAR 1997

CONFERENCE REPORT

TO ACCOMPANY

H.R. 3610

SEPTEMBER 28, 1996.—Ordered to be printed

U.S. GOVERNMENT PRINTING OFFICE
27–409 WASHINGTON : 1996

SOCIAL SERVICES BLOCK GRANT

The conference agreement provides $2,500,000,000, instead
$2,480,000,000 as proposed by the House in H.R. 3755 ai
$2,240,000,000 as proposed by the Senate in H.R. 3755 as report
from Committee. The agreement supersedes P.L. 104–193, the We
fare and Medicaid Reform Act, which provides $2,380,000,000 f
the social services block grant in fiscal year 1997.

CHILDREN AND FAMILIES SERVICES PROGRAMS

(INCLUDING RESCISSIONS)

The conference agreement includes $5,383,569,000, instead
$4,886,793,000 as proposed by the House in H.R. 3755 a
$4,688,434,000 as proposed by the Senate in H.R. 3755 as report
from Committee. In addition, the agreement includes rescissions
prior appropriations of $27,000,000 as proposed by the Senate. T
House bill included no rescissions. The agreement includ
$3,981,000,000 for the Head Start program and $489,600,000 f
the Community Services Block Grant.

Within the social services and income maintenance resear
activity, the conferees are in agreement with the Senate Repo
concerning the use of funds for the completion of current fam
support center grants. The conference agreement also includes su
ficient funding within this activity to carry out activities authoriz
by section 413(h)(3) of the Social Security Act involving demonstr
tions of innovative strategies which would include funding for su
cessful programs that move people from welfare to work. The Se
retary is urged to provide funding that is fully adequate to ca
out this section.

The conferees expect the Department to contribute, from r
sources provided for social services research, to the Residential E
ergy Consumption Survey and the Census Bureau March curre
population survey to assure that the low-income household com
nent is included in the survey.

The conferees concur in the Senate Report language concerni
the job creation demonstration authorized under section 505 of t
Family Support Act of 1988 and the language concerning the Al
ka Federation of Natives.

The agreement includes language as proposed by the Sen
requiring the Secretary to use up to one percent of CSBG funds
FY 1997 to correct allocation errors that occurred in FY 1995 a
FY 1996 to ensure that the minimum allotment to each State
each of those years would be $2,222,460. The House bill had
similar provision.

The agreement includes language as proposed by the Sen
requiring that no more than one-half of one percent of CSBG fu
shall be used to carry out section 674(a) of the Community Servi
Block Grant Act. This section deals with training and technical
sistance, evaluation and data collection. The House bill had
similar provision.

The agreement inserts several legal citations proposed by t
Senate modified to cite the Social Security Act instead of the W
fare Reform Act, deletes a citation for the community schools p
gram under the Crime Trust Fund proposed by the Senate and

	FY 1996 Comparable	FY 1997 Request	House	Reported Senate	Conference	---------- Conference FY 1996	H
CHILDREN AND FAMILIES SERVICES PROGRAMS							
Programs for Children, Youth, and Families:							
Head start	3,569,329	3,981,000	3,600,000	3,600,000	3,981,000	+411,671	+381,0
Consolidated runaway, homeless youth program	---	68,672	---	---	---	---	-
Runaway and homeless youth	43,653	---	43,653	43,653	43,653	---	-
Runaway youth - transitional living	14,949	---	14,949	14,949	14,949	---	-
Subtotal, runaway	58,602	68,672	58,602	58,602	58,602	---	-
Teen pregnancy prevention initiative	---	30,000	---	---	---	---	-
Child abuse state grants	21,026	22,254	21,026	21,026	21,026	---	-
Child abuse discretionary activities	14,154	---	14,154	14,154	14,154	---	-
Temporary childcare/crisis nurseries	9,836	---	---	---	---	-9,836	-
Abandoned infants assistance	12,251	14,406	12,251	12,251	12,251	---	-
Child welfare services	277,389	291,989	277,389	277,389	291,989	+14,600	+14,6
Child welfare training	2,000	---	4,000	4,000	4,000	+2,000	-
Child welfare innovative programs	---	39,178	---	---	---	---	-
Child welfare longitudinal study (non-add)	(6,000)	(6,000)	(6,000)	(6,000)	(6,000)	---	-
Welfare reform research (non-add)	---	(15,000)	(15,000)	(15,000)	(15,000)	(+15,000)	-
Adoption opportunities	11,000	---	11,000	15,000	13,000	+2,000	+2,0
Social services & income maintenance research	---	10,000	---	17,000	44,000	+44,000	+44,0
Family violence 1/	32,643	32,619	35,042	---	62,000	+29,357	+26,9
Community Based Resource Centers	23,000	60,869	---	32,835	32,835	+9,835	+32,8

1/ $32,643,000 funded in Senate bill under battered women's shelters with the violent crime reduction trust fund.

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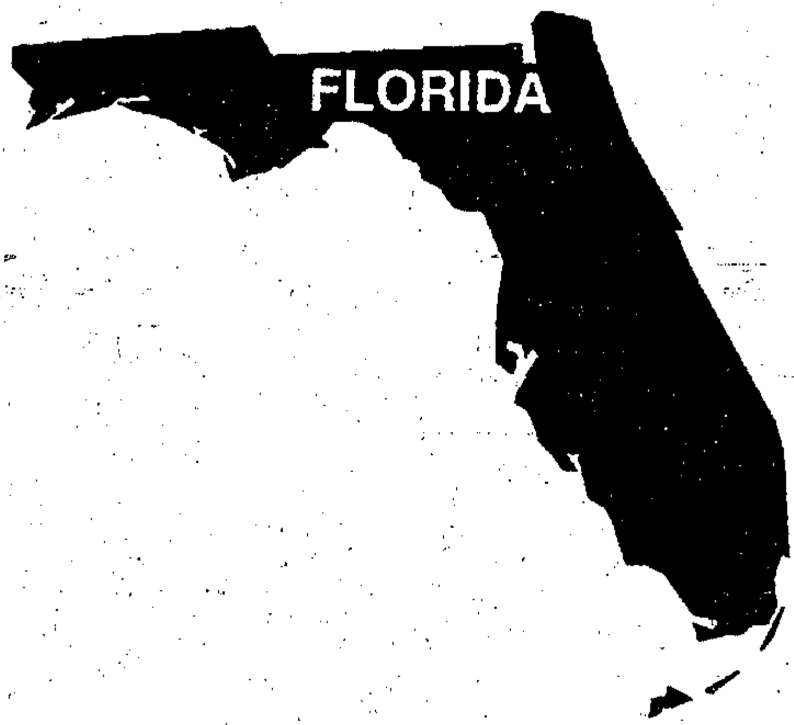
0	-2,000	D
0	+27,000	D
8	+62,000	D
5	---	D

WR-Florida



FLORIDA

Florida is implementing a "Family Transition Program" for AFDC recipients in two counties. Under the plan, most AFDC families will be limited to collecting benefits for a maximum of 24 months in any 5-year period.

Individuals who exhaust their transitional AFDC benefits, but are unable to find employment, will be guaranteed the opportunity to work at a job paying more than their AFDC grant. The demonstration also provides a longer period of eligibility – 36 months in any 6-year period – for families who are at a high risk of becoming welfare dependent.

Medicaid and child care benefits will be available in the demonstration. Local community boards will play a large role in overseeing the program.

Other elements of the demonstration include an increase in the earnings disregard formula and asset ceilings, as well as a statewide requirement that AFDC parents must ensure that their children have been immunized.

1993 AFDC cases 254,006, demonstration covers 96% of caseload.

Florida's waiver request was received on September 21, 1993, and granted on January 27, 1994.

Florida:

Family Transition Program

Mid-February Status Report

	near Gainesville ← Alachua	Escambia → Pensacola (mandatory participation)	
Assigned	739	1,651	
Volunteered	200	n/a	
Pct Volunteers	27%	n/a	
Entered Employment	64	291	→ Total: 355
Full-time	41	178	→ Total: 219
Part-time	23	113	→ Total: 136
Average Wage	$5.55	$5.51	

as of 2/15/95

FOR IMMEDIATE RELEASE
Thursday, Jan. 27, 1994

Contact: David Siegel
(202) 401-9215

HHS Secretary Donna E. Shalala today approved a welfare reform demonstration for the state of Florida which makes several major changes to the Aid to Families with Dependent Children (AFDC) program.

"Over the past several months, our department has approved nine other state welfare demonstrations as part of the administration's commitment to state flexibility and experimentation. I am confident the Florida demonstration I am approving today will add to our knowledge of how welfare can most effectively be reformed," Secretary Shalala said.

Under the demonstration, called a "Family Transition Program," certain welfare families in two Florida counties will be limited to collecting AFDC benefits for a maximum of 24 months in any five-year period. Families that lose benefits because of this time limit, and are unable to find employment, will be guaranteed the opportunity to work at a job paying more than their AFDC benefits.

Mary Jo Bane, assistant secretary for children and families, said, "I am pleased we have worked with the state to develop a program that implements a commitment to transitional welfare followed by work."

Major elements of the demonstration include:

- A new requirement that will limit AFDC families to two years of transitional benefits after which they will work. Exceptions to the rule will apply in cases where recipients are not able to work or have very young children. Also, families deemed to be at high risk of long-term welfare dependency could receive benefits for 36 months in a six-year period. Families that lose benefits because of the time limit will enter a "transitional employment" program, in which they will be offered employment in private- or public-sector jobs.

- To encourage work, AFDC families will have the first $200 in monthly income, plus one-half of the remaining amount, disregarded when AFDC benefits are calculated. This represents a significant increase over current earnings disregards.

- MORE -

- Families will be able to accumulate up to $5,000 in assets as well as have up to $8,150 equity in a car so long as the vehicle is utilized primarily for self-sufficiency purposes. Current law limits a family's assets and equity in one automobile to $1,000 and $1,500, respectively.

- Medical care and child care benefits will be extended for families who are in transition from AFDC to self-sufficiency.

- Finally, AFDC parents will need to ensure that their children have been immunized and are regularly attending school. Benefits can be reduced when either requirement is not being met.

Florida's demonstration will include a rigorous evaluation using random assignment to control and experimental groups.

The Clinton administration has previously approved welfare demonstrations for Colorado, Georgia, Illinois, Iowa, Oklahoma, Vermont, Virginia, Wisconsin and Wyoming. Most of the demonstrations include some form of linkage between receipt of welfare to enrollment in self-sufficiency activities.

# # #

FLORIDA - Family Transition Program

Description

- Replace the current $90 and $30 and one-third disregards, in determining the amount of AFDC benefits, with a single, non-time-limited disregard of $200 plus one-half the remainder.
- Eliminate the 30-day unemployment requirement, the 100-hour rule, the required quarters of work, and (on a case-by-case basis) the 6-month time limit requirements in the AFDC-UP program.
- Limit eligibility for AFDC benefits for applicants and current recipients, with some exceptions, to 24 months in any 60-month period. A family whose AFDC time limit expires will be offered transitional employment in a private or public-sector job.
- Increase transitional child care benefits and remove the periodic income reporting requirement for transitional Medicaid.
- Disregard for 6 months the income of a stepparent whose needs are not included in the AFDC assistance unit.
- Raise the AFDC resource limit to $5,000 and the vehicle equity value limit to $8,150.
- Exclude interest income of AFDC recipients in determining AFDC and Food Stamp benefits.
- Require school conferences, regular school attendance, and immunizations.
- Modify the JOBS program by lowering the age of child for JOBS exemption to 6 months, allowing non-custodial parents' participation in employment and training activities, allowing incentive payments to employers, and establishing a bootstrap training program to continue the provision of education and training services to those who lose AFDC benefits.
- Disregard certain income of teenagers in determining AFDC and Food Stamp benefits.

Status

Application received September 21, 1993

Approved January 27, 1994

Proposed implementation date: February 1994

WR-Florida

GOODWILL
INDUSTRIES
MANASOTA, INC.

March 10, 1995

Mr. Bruce Reed
The White House
Office of Domestic Policy
Washington, DC

Dear Bruce:

First, thank you for your time, interest and enthusiasm for Goodwill's Welfare to Work Demonstration Project Initiative.

On behalf of Senator Cook, Carl Bauer, Sandra Purgahn, and Mike Langton, thanks for taking your time to "hear the good news of Goodwill" and to review ways you can help us:

1.) Demonstrate the viability of our innovative JOB CONNECTION program supported by the donations of usable discards;

2.) Demonstrate the viability of "partnering" with the 190 Goodwill Industries: the nation's largest provider of compensated work experience and placement of chronically unemployed "welfare" recipients.

Just as Phil Lader has already visited and toured our program, so we are inviting Secretary Reich and Secretary Shalala for a tour in June.

You could help us a great deal in reinforcing to Secretaries Reich and Shalala our invitation and sharing with him your interest and enthusiasm.

As we continue this initiative, we have taken the liberty of including you as an "ex officio" member of our team and will be sending along regular updates on our progress.

7501 Bradenton Road
Sarasota, Florida
34243-3203
tel. (813) 355-2721
fax (813) 359-1822

In brief summary, we are being supported in appearances and testimony before Senator Kassebaum's Labor Committee and Senator Packwood's Finance Committee.

Finally, allow me to extend my personal invitation to come to Sarasota for a tour. I'll even buy dinner.

Once again, thanks for your help and interest.

Sincerely,

Don

The Rev. Mr. Donald L. Roberts

/pf
cc: Senator Marlow Cook
Carl Bauer
Sandra Purgahn

THE WHITE HOUSE

WASHINGTON

5.4.94

Bruce:

This comes to you via Mike Langton in J'ville, Fl. He's a former state rep. who was a primary supporter.

Thanks.

J. Eller

WR - Florida

WELFARE REFORM AS

PROPOSED BY PRESIDENT CLINTON

CAN WORK....

ASK JOSE GARCIA

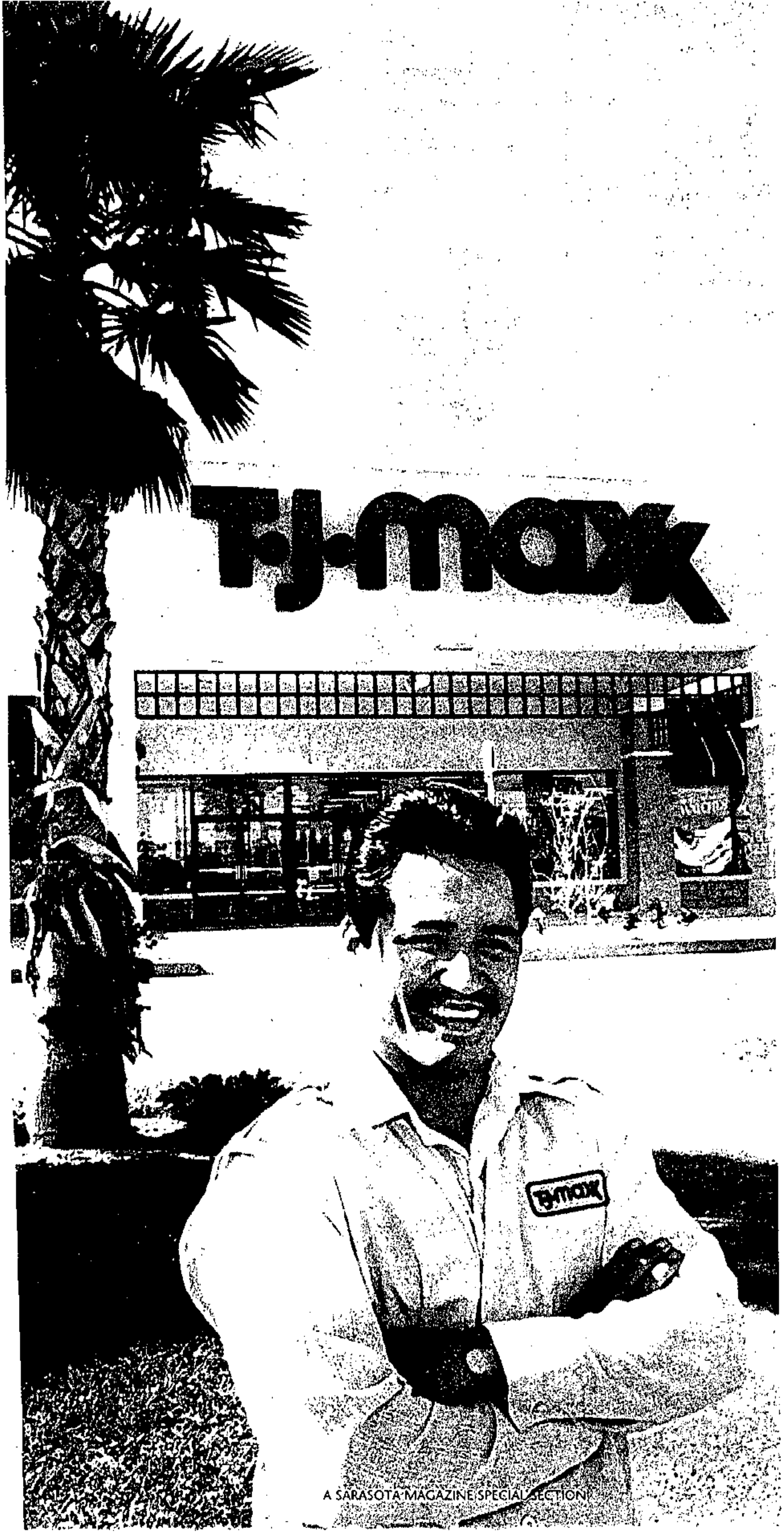


PHOTO BY GREG WILSON

I CAN DO THAT

Goodwill helped José Garcia find hope and a new life.

Not too long ago, 25-year-old José Garcia was picking tomatoes in a blazing hot field outside of Bradenton for $12 a day. His wife had left him, he had two small sons to support and he was living out of his station wagon. Like most of those who worked alongside him, Jose had never received health insurance, benefits and overtime. "In the fields you're nobody," he remembers. "They treat you like an animal."

Jose stopped by a Goodwill Community Training Center to buy clothes and saw a sign that said, "Need a job?" That was about six months ago.

Today José has been transformed. He works as a head receiver, the person in charge of receiving shipments and handling maintenance, at T.J. Maxx in Bradenton. His Goodwill employment specialist says Jose even looks like a different person. "I didn't recognize him when he went on his job interview," she says. "His hair was cut and he had on a shirt and tie." More important, she adds, "He really grew as a person. All he needed was a little direction."

His new boss at T.J. Maxx says, "Thank God, they sent us José. He's an outstanding associate. He never waits to be asked. He's assertive and takes initiative. If Goodwill were to call me today about another graduate, I'd immediately make an opening."

José credits Goodwill with giving him confidence and hope for the future. "I felt alone when I walked into Goodwill," he says. "But as soon as I came in, they said, 'Relax, have some coffee.' You feel really comfortable."

For José, life suddenly feels like it's just beginning. He's planning to take vocational courses to learn how to repair engines and he's even teaching himself French.

"They taught me not to be afraid," José says. "I'm more confident now. I trust myself. When I see an opportunity, I say, 'I can do that.'"

SUGGESTED WELFARE REFORM PROGRAM
DEMONSTRATION PROJECT

"NEIGHBORHOOD COMMUNITY TRAINING CENTERS (CTC)"

<u>THE BACKGROUND</u>

Goodwill-Manasota, Inc., serving Sarasota, Manatee, Hardee and DeSoto counties of Florida created their innovative Neighborhood Community Training Center (CTC) concept in 1987 with the opening of a prototype in Manatee county. They now operate 14 CTC's in neighborhoods throughout the 4 counties.

The concept of the CTC is two-fold:

1. Develop a Goodwill donated goods business in a convenient neighborhood setting making it convenient for;

   a. DONORS: the donors of usable discards (clothing, shoes, purses, household items, small appliances, small electronics, etc.)

   b. SHOPPERS: the shoppers who purchase their neighbors donated and recycled usable discards (sales last year from 14 CTC's were in excess of $4,000,000)

   c. CHRONICALLY UNEMPLOYED: the persons who are chronically unemployed or underemployed have a convenient neighborhood center to find 1) **JOBS;** 2) **JOBS TRAINING;** 3) **PLACEMENT INTO UNSUBSIDIZED EMPLOYMENT** (last year over 1700 chronically unemployed persons came through our Job Connection doors of the CTC seeking assistance in finding training and jobs).

2. Target, employ, train and place chronically unemployed persons into competitive employment by utilizing the business activity and payroll generated by the donated goods business. In 1993, 166 Goodwill trainees graduated to unsubsidized jobs, outside Goodwill's payroll, resulting in an estimated $1,455,554 million in earnings (average hourly rate of $5.45) and generating $291,111 in new tax revenues.

   Once a CTC is constructed it is <u>self-supporting</u> and operates without continuing public support, leverages available community public support outside the CTC for the client, creates jobs (two labor hour per donor in our case), creates real work training with accompanying paycheck, creates support services of education in vocational skills, transportation skills, residential skills, and relationship skills (family values support).

<u>WHY IT MAKES SENSE TO INCLUDE CTC's AS PART OF PRESIDENT'S WELFARE REFORM PACKAGE</u>

The CTC fits the President's "Replacing Welfare with Work" initiative in the following ways:

The policy statement concerning the Presidents welfare reform legislation states "The fundamental objective of welfare reform -- and the standard by which the Presidents bill will be judged -- must be job placement"..."in the private sector"..."as soon as a person goes onto the welfare rolls".

The CTC is a neighborhood community training center which immediately creates jobs, training, and placements all funded by the flow of donated goods and their resale.

MAKING WORK PAY: The CTC, because of its neighborhood characteristic, allows for the development of work related support systems such as child care (in neighborhood churches/synagogues etc.) to support and maintain the welfare recipient in stabilizing themselves into employment.

TIME LIMITED ELIGIBILITY: The CTC program currently stabilizes welfare recipients into unsubsidized employment within one year.

JOB PLACEMENT: The CTC allows for direct placements without training where appropriate and based upon vocational assessments and evaluations. It also allows for placements as an integral part of being a Goodwill employee/trainee while on Goodwill's payroll as an interim step in the placement process.. It also, allows for and specializes in coordination of readily available placement services through the Florida Job Service, JTPA programs, private job placement services, and the plethora of not for profit placement initiatives.

COMMUNITY SERVICE JOBS AS A LAST RESORT: The CTC is a private sector not-for-profit initiative that is immediately replicable throughout North America. Goodwill currently has approximately 2000 "stores" that **<u>could</u>** be turned into neighborhood community training centers **<u>if, through a demonstration project,</u>** we could prove to everyones satisfaction the efficacy of this innovative private sector neighborhood based approach.

TEEN-AGE PREGNANCY PREVENTION: The CTC's neighborhood setting allows for training and awareness programs which are convenient to the target population. The CTC's currently offer GED classes combined with "life-skills" training appropriate to the need of the welfare recipient.

THE DEMONSTRATION PROJECT

Goodwill Manasota, Inc. seeks a one-time capitalization grant to construct 12 new CTC's in identified "unserved neighborhoods" which will garner an additional 120,000 donors creating an additional 240,000 labor hours or an additional 115 FTE's resulting in an additional <u>115 chronically unemployed</u> persons being placed into competitive employment <u>annually.</u>

Our experience since inception in 1987 is we can graduate approximately one welfare recipient annually into competitive employment for each FTE of labor force. (I.E. last year's 166 graduates came from a labor force of some 175 FTE's)

To expand this network within our assigned territories of Sarasota, Manatee, Hardee, and DeSoto counties will require a capital investment of $8 million dollars for the land acquisition, site development, building construction, and equipment necessary to operationalize the collection, resale, employment and training of welfare recipients in neighborhood settings.

Once this public/private partnership venture demonstrates the success we anticipate, the CTC could become the model for the country.

Goodwill-Manasota, Inc.
Rev. Donald L. Roberts, CEO
7501 Bradenton Road
Sarasota, Florida 34243-3203
(813) 355-2721

WR – [illegible]

Florida's Experiment in Time Limit for Welfare Underscores Snares Facing Clinton's Proposal

By RON SUSKIND
Staff Reporter of THE WALL STREET JOURNAL

PENSACOLA, Fla.—Marie McGill—with a 10th-grade education, a four-year-old daughter, an ex-husband she just raced across two states to escape, no job and no money—fidgets in her faded jeans as she peruses America's fast-changing social contract.

"This is great; I'll get all this job training and child care," says the 23-year-old welfare mother, before reading down a few paragraphs of small print. "Hey. What's this about 24 months? About this being only for two years? What's going on?"

Her case worker explains, in a measured cadence, that "we'll just have to figure a way to make you self-sufficient before we hit that deadline."

Ms. McGill smiles wanly. "They don't realize how hard it is these days to get off welfare," she says. "I know, I done tried."

Painful Experience

Setting a two-year limit on benefits—a mantra now hummed by President Clinton and almost every U.S. governor—was the easy part. But, a month into Florida's pioneering reform program, the word from Pensacola welfare workers is that ending decades of dependency will be more painful and expensive than politicians are willing to acknowledge.

"We're looking at an avalanche of needs, people who've been neglected for so long," says Shirley Jacques, who's helping run this pilot program in northern Florida, the first mandatory program that combines a two-year time limit with almost all the features in a welfare-reform proposal President Clinton is preparing to send to Congress. "Our case workers can't believe the depth and array of the problems. Two years, and off? I wouldn't bet on it."

While policies are being mapped out in Washington, states are racing ahead. Next up is Vermont, where about 60% of the state's recipients will start signing onto a 30-month time limit in July. In all, 19 states have received federal waivers to try their own welfare plans and will soon walk the same path Florida is now treading.

Welfare Resumé

Most welfare recipients have recently worked, have small children, but are hampered by poor education and skills.

Recipients* of aid to families with dependent children in U.S. who have:	
Worked in past two years	59.6%
At least one child under 3 years old	60.4%
11 years or less of education	51.5%

*1991 caseload

Source: Department of Health and Human Services

In trailer parks and public-housing projects on the gritty panhandle where Florida meets Alabama, abstractions found in the Clinton proposal, like "changing the culture of welfare offices," promoting "parental responsibility" and "making work pay," meet flesh and are often found wanting.

"There's no magic bullet," says Ron Mincy, a Ford Foundation program manager who worked with the president's welfare-reform task force until a few months ago. To reduce the welfare population—now at 14 million, a daunting 5% of the U.S. population—"means inventing a way to attack underlying causes" he asserts, such as crime, drugs and illegitimacy, along with the inadequate education and skills of 70% of recipients who get off public assistance in their first two years—generally into low-rung, service-sector jobs—only to have most slip back onto welfare over the next three years.

Those who have studied state experiments that have road-tested parts of what the president is now proposing say the Clinton plan overstates effectiveness, and understates costs, of many welfare-reform programs.

"I wish he hadn't promised so much," says Judith Gueron, president of Manpower Demonstration Research Corp., a firm whose studies of state programs are relied upon by Clinton aides, "because we're sure to end up with a plan that spreads limited resources thinly across the whole country, and won't end up doing much, or even teaching us much about what works."

New Dialogue

In Pensacola, the two-year clocks began ticking Feb. 11, with about one in four of those applying for welfare benefits being randomly selected—in all, now, about 60 participants. One morning last week, at a makeshift "family transition" office north of town, the new dialogue between welfare caseworkers and recipients—with increased obligations on both sides—is beginning.

THE WALL STREET JOURNAL

One after another, welfare recipients, works periodically in local fast-food restaurants—signs a commitment contract, officially entering a program that may soon be commonplace across the country. She'll get assessed as to her educational level, take some basic education classes, maybe work part-time, get job training and eventually be assisted in finding a secure job. If one isn't found after two years, she probably will be put into a community work program in exchange for continuing benefits.

Of course, the troubled lives of many welfare recipients tend to resist such neat progressions. "Job training—you've got to be kidding," says supervisor Linda Jenkins, whose caseworkers have found themselves neck-deep in issues such as domestic violence and drug addiction. "First, they need their electric bills paid. They need to learn how to be parents, how to budget money."

Such realizations have helped transform the turnstile culture that has defined offices like this one in the past few years, as caseloads grew and resources shrank.

"The idea was to make sure they were eligible for continued benefits, and then get them out as fast as you could," says Lori Taylor, who worked in a nearby welfare office before becoming one of a few dozen caseworkers selected for the pilot. "Sometimes, when they'd want to talk about their problems, you'd try to cut them off before it got too far. You didn't even look at them."

Two months ago, Ms. Taylor had 200 welfare cases, seeing each recipient at six-month intervals. Now she handles half a dozen recipients and is working harder than ever, running into the complacency and scarce resources of state agencies where attitudes haven't changed. Success is often in simple acts: she buys a rocking chair for one welfare mother so she can rock her baby to sleep, helps another move from a cinder-block shack to adequate housing. Caseloads will rise to a still-modest 80 per caseworker as the program expands to 2,500 participants over the coming year, a ratio probably too costly to replicate nationally, with the administration anticipating 1.6 million recipients in its proposed program by 1999.

Yet, welfare administrators here are quietly talking about loopholes, figuring that even their intensive program will leave many recipients without secure work when the two-year clocks run out.

"If we can't find them a job at the end of two years, we haven't held up our end," says Mamun Rashied, area social-services administrator and welfare-reform advocate, speaking of how fragile a new social contract may prove. "Then the contract is broken."

Caseworker: "Would you be interested in seeing a counselor, to talk about some of your problems?"

Recipient: "Forget it. Counselors don't do no damn good."

Caseworker: "Well, can we help you get a dress you can wear to a job interview?"

Recipient: "Got one, a church dress. I'll be fine."

The recipient, Thrēasa Sledge, a pudgy 19-year-old sporting sneakers, a baseball cap and a don't-mess attitude, softens a bit when talk turns to her four-year-old son and how they'll manage if she is still jobless 24 months from now, when her welfare runs out. "I have to make my own safety net," she says quietly. "I don't know; I guess I have to start some kind of savings account, and put money in it."

Ms. Sledge — who, like many recipi-

WR-Florida
cc: RAHM

55

WR - Florida

MANPOWER DEMONSTRATION RESEARCH CORPORATION

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November 29, 1993

Mr. Bruce Reed
Deputy Assistant for Domestic Policy
The White House
The Old Executive Office Building
Room 216
Washington, D.C. 20500

Dear Bruce:

On December 7, MDRC will be releasing the first findings from an ongoing evaluation of Florida's JOBS program, Project Independence. After a one-year follow-up period, Florida's program, which emphasized relatively low-cost job placement services while providing some education and training, increased people's earnings (compared to a control group) by nearly 7 percent and also reduced their welfare payments by almost 7 percent. The program's effects were concentrated among single parents with school-age children, whose earnings increased by 11 percent during the first year. Single parents with younger children (3 to 5 years old) – a key group seldom studied previously – experienced a 5 percent reduction in welfare payments but no significant increase in earnings.

Overall, the results add to a growing body of evidence that states can operate JOBS programs that have serious participation requirements, and produce earnings increases and welfare savings. They also point to the importance of the planned longer-term follow-up, to determine whether these modest gains increase over time as they have in most studies of similar programs.

The positive but limited results suggest that the future challenge will be to build and improve on this base, a task that becomes particularly urgent as state and federal discussion turns to more radical changes, for which JOBS' success is a prerequisite.

I thought you might want to see an advance copy of the report's Executive Summary, which is enclosed. **Please note that it is embargoed until December 7.**

Best wishes,

Judy

~~Judith~~ M. Gueron

MDRC

Manpower
Demonstration
Research
Corporation

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New York, New York 10016
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EMBARGOED UNTIL DEC 07 1993

The contents of this draft are for discussion only and are not for quotation, publication, or distribution until that date.

EXECUTIVE SUMMARY

FLORIDA'S PROJECT INDEPENDENCE:

PROGRAM IMPLEMENTATION, PARTICIPATION PATTERNS, AND FIRST-YEAR IMPACTS

James J. Kemple
Joshua Haimson

Manpower Demonstration
Research Corporation

December 1993

The Manpower Demonstration Research Corporation's evaluation of Florida's Project Independence Program is funded by a contract with Florida's State Department of Health and Rehabilitative Services and with support from the Ford Foundation and the U.S. Department of Health and Human Services.

The Metropolitan Life Foundation contributed to the publication of the report.

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EXECUTIVE SUMMARY

Since 1987, Project Independence has operated as Florida's statewide welfare-to-work program, which aims to increase the employment and foster the self-sufficiency of applicants for and recipients of Aid to Families with Dependent Children (AFDC), the major federal/state cash welfare program. Florida was among a handful of states that anticipated federal welfare reform legislation – the Family Support Act of 1988 and its centerpiece, the Job Opportunities and Basic Skills Training (JOBS) Program – by strengthening the link between AFDC receipt and obligations, opportunities, and supports for parents of poor families to obtain employment. With minor changes, Project Independence became Florida's JOBS program in 1989.

This report presents findings on Project Independence's operations and implementation, as well as its initial effects on employment, earnings, and AFDC receipt. It is the first of two reports from an evaluation by the Manpower Demonstration Research Corporation (MDRC) under contract to the Florida State Department of Health and Rehabilitative Services and with support from the Ford Foundation and the U.S. Department of Health and Human Services. The study is being conducted in nine counties that were selected randomly from among the state's 25 largest in terms of AFDC caseloads. The research sample consists of more than 18,000 single parents (most of them mothers) in those nine counties. Specifically, it includes those who were applying for AFDC or who were being assessed for continuing AFDC eligibility between July 1990 and August 1991, and who were required to participate in Project Independence (certain categories of individuals, such as those with children under the age of three, were exempt). The results in this report reflect the program as it operated during this period (it has since been modified) and are limited to the first year after these individuals became part of the research sample.

The evaluation is of broad national interest because it assesses the effectiveness of a particular JOBS approach: one that emphasized immediate entry into the labor force for the majority of its participants and that required ongoing participation for most of the state's AFDC population, including those with children age three and older. Importantly, this report presents the first findings to date on the effectiveness of a mandatory JOBS program for single parents with preschoolage children. Project Independence operates under a wide range of local circumstances across Florida – a state with the nation's seventh largest AFDC population. Like most states' JOBS programs, Project Independence is state-administered and attempts to promote a relatively uniform set of goals and operating procedures, while allowing local program offices some discretion to adapt these to their circumstances. For this reason, the random selection of counties for the study is important because it will enhance the extent to which the findings can be generalized to the state as a whole.

Highlights of the Findings

Project Independence achieved substantial compliance with its participation mandate. Seventy-seven percent of those required to participate in the program attended orientation. Among those who did not attend orientation or a program activity, many found work on their own or were subject to the program's "sanctioning" procedures, which were designed to impose an AFDC grant reduction if individuals did not provide an acceptable reason for not meeting participation requirements.

Fifty-six percent of those who attended orientation went on to participate in a job search, education, or training activity – a rate similar to those found in other welfare-to-work programs. Individual job search and group job club were the most common activities, with 42 percent of those who attended orientation participating. About half that number participated in education or training activities. Parents with preschoolage children and those whose youngest child was age six or older received similar services once they began participating in the program. However, a smaller percentage of parents with preschoolage children participated in program activities after orientation. Finally, although overall participation rates were high, individuals were engaged in activities for an average of less than two months during the follow-up period.

Overall, Project Independence's short-term effects on labor market and AFDC outcomes were positive. Project Independence increased first-year employment rates and earnings and reduced first-year AFDC receipt rates and payments. At the end of the first year of follow-up, just over 64 percent of those who were referred to the program were receiving AFDC compared to just under 69 percent of a control group that did not have access to the program – a 4 percentage point difference. The program produced first-year earnings gains (again, compared to the control group) averaging $157 per person referred to the program. (This average includes individuals who did not work, worked part-time, or worked for only part of the year.) The earnings gains were concentrated among two groups: (1) individuals defined by the program as "job-ready" and therefore targeted to participate in individual job search (rather than basic education or training) as their first program activity, and (2) single parents whose youngest child was age six or older. The first-year results for the latter group are similar to those found for single parents with schoolage children in studies of a number of pre-JOBS programs and in the evaluation of California's

Greater Avenues for Independence (GAIN) Program — the most recent evaluation of a JOBS program with comparable data.

These early results should be interpreted with caution. Studies of other welfare-to-work programs have found that impacts changed after the first year of follow-up, and increases or decreases in impacts may occur for Project Independence. This may be particularly true for those engaged in education and training activities, which last longer than job search and may take more time to produce impacts. The final report on Project Independence — scheduled for late 1994 — will present longer-term results and will compare the program's costs with its benefits from the perspectives of participants, government budgets, and society as a whole.

The Project Independence Program Model

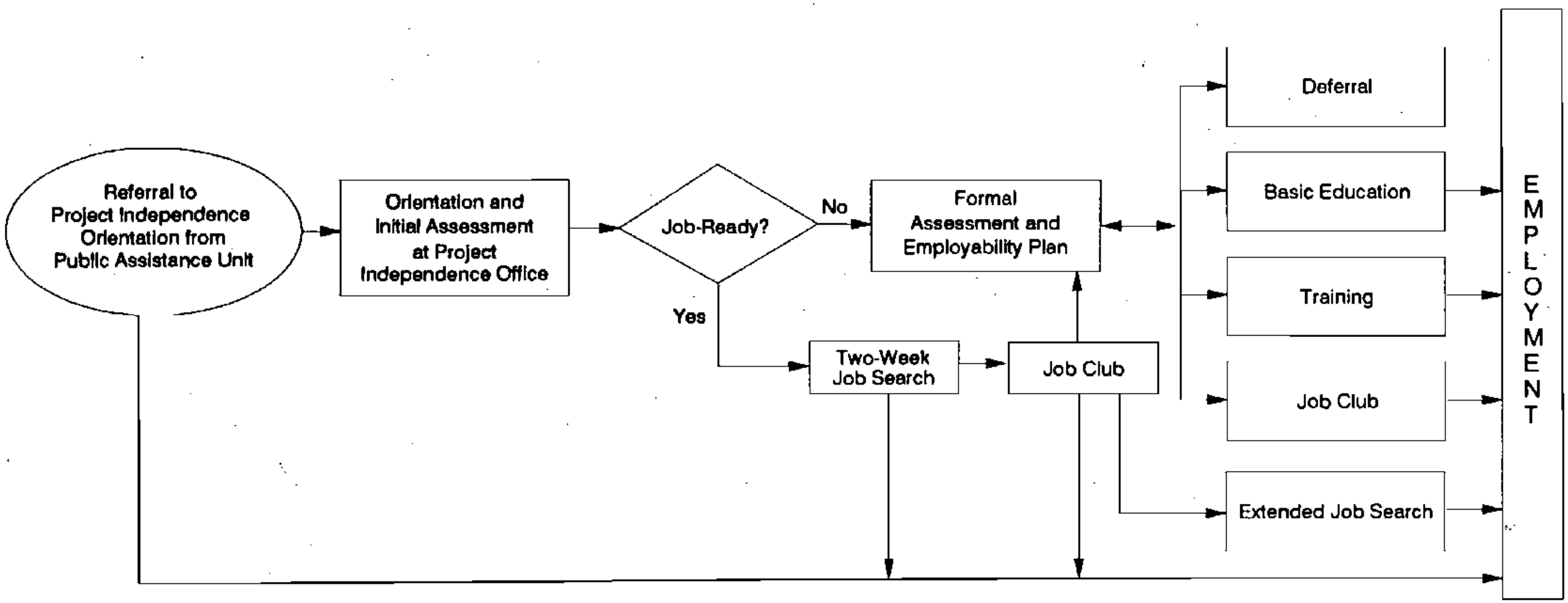
Figure 1 is a simplified depiction of the Project Independence program model. All AFDC applicants and recipients are scheduled to attend Project Independence orientation unless they meet official exemption criteria (e.g., they have a child younger than age three or a chronic illness or disability that would make it impossible to participate). During orientation, program staff assign individuals to one of two service tracks based on their educational attainment level and recent employment history. At the same time, staff assist individuals in obtaining support services needed to make participation in Project Independence or employment possible.

The first service track begins with a two-week individual job search and is targeted for those who are "job-ready" according to Project Independence criteria. During the period when the research sample became part of the study (July 1990 through August 1991), the program took an expansive view of job-readiness: The job-readiness criteria — completion of at least the tenth grade or employment in at least 12 of the previous 36 months — meant that a large majority of those required to participate in the program were considered to be job-ready. These criteria, combined with an emphasis on case managers' meeting specific job placement standards, reflected Project Independence's employment-focused approach to self-sufficiency.

The initial job search component requires participants to make contact with at least 12 employers to apply for a job. Those who do not find employment are then assigned to a group job club — a two- to three-week course on how to look for a job, prepare a resume, fill out applications, and present oneself in an interview. Participants who remain unemployed after completing job club are usually referred for a formal assessment, in which they discuss their career interests with a case manager, develop an

FIGURE 1

SIMPLIFIED DEPICTION OF THE PROJECT INDEPENDENCE PROGRAM MODEL



Employability Plan, and are assigned to education or training activities, which are provided by local adult schools, community colleges, and proprietary institutions.

The second service track begins with a formal assessment followed, in most cases, by a referral to basic education or training activities. During the period when the research sample became part of the study, this service track was targeted for a narrowly defined group of participants designated "not job-ready" (i.e., they had not completed tenth grade and had worked in fewer than 12 of the previous 36 months). Beginning in October 1991, the "not job-ready" criteria were expanded to include those who did not have a high school diploma or a General Educational Development (GED) certificate and had worked in fewer than 12 of the previous 24 months. An important rationale for this change was the belief that those with no high school diploma or GED required further education before being able to secure stable employment. This report presents preliminary evidence about whether, in fact, these individuals benefited from the program as it operated prior to the change in the job-readiness criteria.

Project Independence also provides support services – such as child care, tuition assistance for training or community college classes, transportation, tools, and uniforms – considered necessary for participants to engage in program activities or to secure employment. Beginning in January 1991, however, budget constraints forced HRS to restrict the availability of child care for Project Independence participants. This is significant for the evaluation because individuals for whom Project Independence was mandatory could be excused from the participation requirements if needed child care services could not be provided.

The Project Independence Evaluation

Techniques of randomization were used both to select the counties and to assign individuals within the selected counties to one of the two groups into which the research sample was divided (as discussed below). Nine counties were randomly selected from among the state's 25 largest in terms of AFDC caseloads. The nine counties are: Bay (Panama City), Broward (Fort Lauderdale), Dade (Miami), Duval (Jacksonville), Hillsborough (Tampa), Lee (Fort Myers), Orange (Orlando), Pinellas (St. Petersburg), and Volusia (Daytona Beach). Together, they account for 58 percent of the state's AFDC caseload and include Florida's eight largest cities as well as some suburban and rural areas. (Predominantly rural counties with extremely small AFDC caseloads were excluded from the study.) The method used to select the counties enhances the evaluation's capacity to produce results that can be generalized to at least 90 percent of the state's AFDC caseload that became mandatory for Project Independence during the period under study.

Randomization was also used for the research sample as the basis for determining the program's effectiveness – specifically, its effects on employment, earnings, AFDC receipt (i.e., months of receipt), and AFDC payments. From July 1990 through August 1991, 18,237 single-parent applicants for and recipients of AFDC in the nine research counties were randomly assigned either to a "program group," which was eligible to receive Project Independence services and was subject to the participation mandate, or to a "control group," which did not have access to the program and was not subject to the mandate. This type of random assignment research design is widely regarded as the most reliable method available for determining the results of programs such as Project Independence. Control group members were given a list of alternative employment and training services in the community. They remained eligible for subsidized child care and tuition assistance for training or community college classes under the same priorities and guidelines as Project Independence participants. Their eligibility for entitlement benefits in addition to AFDC – such as Food Stamps and Medicaid – was unaffected.

Because the two groups were created by chance, using a lottery-like process, there was only one systematic difference between them: Only those in the program group could be involved in Project Independence. As a result, the control group provides information on the levels of employment, earnings, welfare receipt, and welfare payments that the program group would have reached if it had not had access to Project Independence and had not been required to participate. Therefore, a comparison of the two groups' behavior over time provides the most reliable estimate of the *difference* that Project Independence's services and mandates made in the program group's subsequent labor market and welfare outcomes. These differences are referred to as the program's "impacts."

Two features of the research design are particularly important to interpreting the impact results. First, random assignment occurred at the Public Assistance Units after AFDC applicants and recipients were determined to be mandatory for Project Independence participation but *before* they were referred to and attended a formal program orientation. On the one hand, this ensures that the study's impact findings will capture the effects produced by all aspects of the program, including those that may motivate individuals to seek employment and discontinue their AFDC grants or applications in order to avoid the participation requirement. On the other hand, many individuals in the research sample did not go on to attend orientation or participate in job search, education, or training activities. Thus, if these services have effects, the program's overall impacts may appear smaller than they would have been if the research sample had included only those who attended orientation or received services. This also means that caution is necessary when comparing these results with findings from evaluations using a different point of random assignment.

Second, 88 percent of the research sample is made up of individuals who were applying or reapplying for AFDC (rather than already receiving it) at the time they were determined to be mandatory for Project Independence. Because the program had been operating for nearly three years prior to the start of the study, most of those who were already receiving AFDC were already in the program and therefore not appropriate for random assignment procedures. Thus, the research sample reflects the *flow* of mandatory individuals into a mature, ongoing welfare-to-work program rather than the full caseload of mandatory individuals who were either being referred to or were already participating in the program. This does mean, however, that the findings on program participation and program effects are influenced most heavily by the behavior of AFDC applicants and reapplicants, who tend to be somewhat less disadvantaged than ongoing AFDC recipients. For this reason, also, caution should be exercised in comparing the results from this evaluation to those from other studies whose research samples include a larger proportion of recipients.

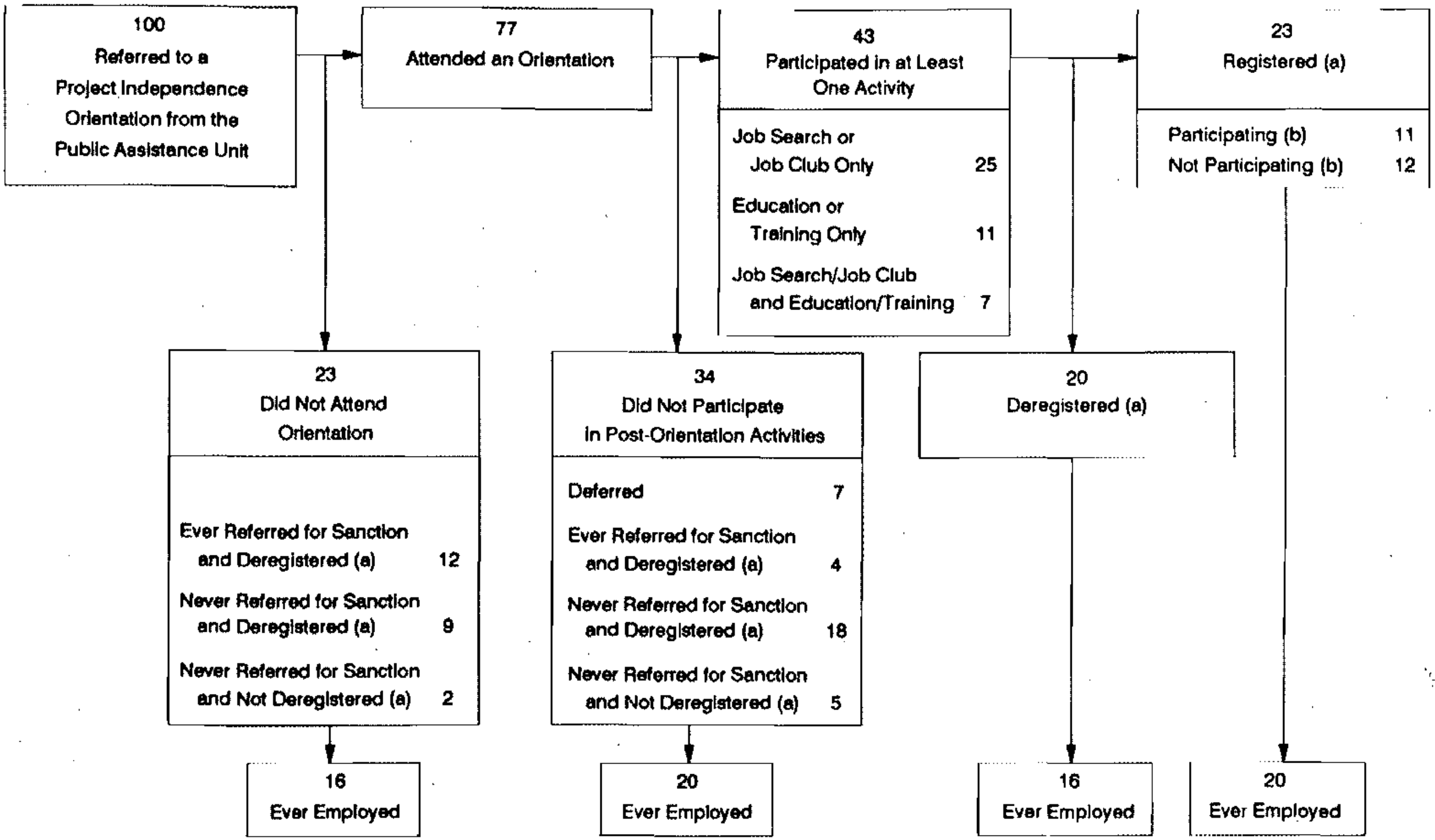
Did Project Independence implement its participation mandate, and how substantial was participation in the program?

- **Project Independence achieved a high degree of compliance with its participation mandate at the initial stage of the model. Approximately three-quarters of those referred to the program attended orientation, and most of those who did not attend were subject to formal enforcement procedures or found work on their own.**

Figure 2 illustrates the flow of 100 typical members of the research sample's program group through Project Independence within the 12 months following their random assignment. It shows that 77 percent of all program group members attended orientation. The figure also indicates that approximately half of those who did not attend orientation (12 of 23 typical program group members) were referred for an AFDC grant reduction (also known as a "sanction") because of not having provided an acceptable reason for missing orientation. (Project Independence records confirmed actual grant reductions for about 10 percent of those referred for a sanction. Many of those whose AFDC grant was not reduced may have provided an acceptable – "good cause" – reason for not attending orientation.) In all, more than 90 percent of those who did not attend orientation (21 of 23 typical program group members) were "deregistered" from the program (i.e., their Project Independence case was closed) at the end of the follow-up period. Approximately 70 percent of those who did not attend orientation (16 of 23 typical program group members) were employed at some point during the follow-up period. In short, very few

FIGURE 2

THE FLOW THROUGH THE PROJECT INDEPENDENCE MODEL
FOR 100 TYPICAL PROGRAM GROUP MEMBERS



NOTES: (a) "Registered" refers to the finding that an individual's case was open at the end of the 12-month follow-up period. "Deregistered" refers to the finding that an individual's case was closed at the end of the 12-month follow-up period.

(b) "Participating" refers to the finding that an individual was actively participating in a job search, job club, basic education, training, or community college activity at the end of the 12-month follow-up period.

of those referred to Project Independence avoided the initial participation mandate without being monitored by staff or legitimately excused from the program.

- **More than half of those who attended orientation participated in a Project Independence job search, job club, education, or training activity.**

Figure 2 shows that 43 percent of all program group members (56 percent of those who attended orientation) participated in at least one post-orientation activity (individual job search, job club, basic education, training, or community college courses). These are similar to the rates found in studies of pre-JOBS mandatory welfare-to-work initiatives and California's GAIN program.

The other studies have also shown that participation in program activities is always substantially below 100 percent. In the case of Project Independence, most nonparticipants (7 of 34) were excused from the participation mandate temporarily (i.e., "deferred"), were referred for a sanction (4 of 34), or were deregistered from the program (22 of 34), in most cases for justifiable reasons under the program's rules (e.g., they stopped receiving AFDC or became exempt because of health reasons). It is also noteworthy that nearly 60 percent of those who attended orientation but did not participate further (20 of 34) were employed at some point during the follow-up period. In short, very few nonparticipants were unaccounted for.

- **Those referred to Project Independence spent, on average, less than one-quarter of the time they were registered for the program participating in program activities. However, many of those who began an education or training activity stayed in it for three to six months.**

Table 1 shows that program group members participated in activities for an average of one and a half of the nearly eight months in which they were registered for the program during the follow-up period. This suggests that Project Independence was only modestly successful in implementing an ongoing participation mandate (i.e., some individuals remained registered for the program but were not engaged in activities). However, those who started a job search or job club activity were active in it for an average of just under two months. Those who started a basic education activity (i.e., adult basic education, GED preparation, or English as a second language) remained in it for an average of three months, and those in training or community college activities participated for an average of six and a half months. This suggests that, for those who participated in education or training activities, the full effect of Project Independence may not be realized until well after the first year of follow-up.

- **Staff found it difficult to ensure that the ongoing participation requirement would be as tightly enforced during later stages of the program as it had been during the initial (orientation) stage.**

TABLE 1

PROJECT INDEPENDENCE FIRST-YEAR PARTICIPATION PATTERNS

Sample and Participation Measure	All Program Group Members	Subgroups, by Age of Youngest Child: Ages 3 to 5	Subgroups, by Age of Youngest Child: Age 6 or Older	Subgroups, by Job-Readiness Status: Job-Ready	Subgroups, by Job-Readiness Status: Not Job-Ready
All program group members					
Attended orientation (%)	77.2	75.7	80.1	77.1	83.4
Ever participated in any activity, excluding orientation and assessment (%)	42.9	39.0	47.7 **	43.7	40.6
Ever participated in any job search or job club activity (%)	32.3	31.3	35.3	33.3	27.5
Ever participated in any education or training activity (%)	17.6	16.2	18.2	16.7	24.2
Sanctioning					
Referred for sanction (%)	24.2	29.7	19.7 ***	26.0	14.9 *
Ever deregistered with a sanction enforced (%)	3.1	2.9	3.0	3.4	1.4
Average number of months registered/participating	7.8/1.6	8.1/1.6	7.5**/1.5	7.7/1.6	8.2/1.1
Program group members who attended orientation					
Ever participated in any activity, excluding orientation and assessment (%)	55.5	51.5	59.6 *	56.7	48.7
Ever participated in any job search or job club activity (%)	41.8	41.3	44.0	43.2	33.0
Ever participated in any education or training activity (%)	22.8	21.4	22.7	21.6	29.0

NOTES: Sample members are defined as "job-ready" if they had completed at least 10th grade or were employed for at least 12 of the 36 months prior to random assignment. Sample members are defined as "not job-ready" if they had not completed 10th grade and were employed for less than 12 of the 36 months prior to random assignment. These definitions are based on the criteria used by Project Independence during the random assignment period.

A chi-square test or two-tailed t-test was applied to differences between subgroups defined by the age of the youngest child and between subgroups defined by job-readiness status. Statistical significance levels are indicated as *** = 1 percent; ** = 5 percent; * = 10 percent.

Increasing AFDC caseloads and budget constraints resulted in caseloads typically growing to more than 200 persons per case manager during the study period, according to an MDRC survey of Project Independence staff. Only about 30 percent of case managers reported that participants were monitored "closely" in their unit. This does not mean that many people remained registered for Project Independence and avoided participation without penalty; in fact, very few did. At the same time, case managers reported that they found it very difficult to respond quickly to participation problems once they became evident.

What types of activity were used most heavily?

- **Reflecting the employment emphasis of the Project Independence model, job search and job club were the most commonly used activities.**

Table 1 indicates that 32 percent of the research sample's program group (42 percent of those who attended orientation) participated in individual job search or job club activities. This relatively high rate is consistent with the fact that a large majority of those in the program group met the definition of "job-ready" and thus would have been initially targeted for these services. In addition, Table 1 shows that 28 percent of those defined as not job-ready also participated in these activities (although usually not as their first activity). This provides evidence that the focus on labor force attachment extended to both the job-ready and not job-ready members of the caseload.

- **The program's emphasis on job search services was complemented by efforts to ensure that education and training were provided to those who needed them.**

Table 1 shows that 18 percent of the program group members (23 percent of those who attended orientation) participated in an education or training activity. Table 1 also shows that such participation was somewhat higher among those defined as not job-ready (24 percent) than among those defined as job-ready (17 percent). However, the latter figure is notable and may reflect, in part, staff discretion in applying the job-readiness criteria. Most staff confirmed in a survey that they would refer job-ready participants to education or training activities as a first activity if they felt it was needed. Also, 7 percent of all program group members (6 percent of those defined as job-ready and 11 percent of those defined as not job-ready) participated in both job search or job club *and* education or training activities. This indicates that Project Independence staff made an effort with some participants to both meet their educational needs and encourage their entry into the labor force.

How did registrants and staff view the assistance and services provided by Project Independence?

- **On average, staff and participants viewed Project Independence and its services positively.**

Responses to MDRC's survey of a portion of the program group members suggest that, for the most part, Project Independence participants had a favorable impression of the program. More than half (52 percent) rated as "very high" the degree to which staff were helpful to them in dealing with problems that could interfere with their participation in the program, the program's likelihood of improving their chances for being employed in the long run, and the probability that they would recommend the program to a friend. On average, participants in Project Independence's job club and education and training activities viewed those activities positively, rating the teachers and instructors as helpful, their classmates as supportive, and the content of what they were learning as valuable.

These findings are consistent with ratings by staff: Almost two-thirds (64 percent) of those surveyed thought that these services were very worthwhile for participants.

- **Most of those referred to Project Independence were aware of the participation mandate, and more than half believed it was "fair."**

Eighty-one percent of those surveyed were aware that their AFDC check could be reduced if they did not participate in Project Independence without a good cause. Fifty-eight percent said it would be "fair" or "very fair" to impose financial sanctions on AFDC recipients who failed to cooperate with the participation mandate.

To what extent did Project Independence participants receive subsidized child care?

- **Overall, 19 percent of those who reported attending Project Independence orientation and who had a child age 12 or younger reported receiving subsidized child care at least once during the follow-up period. Most participants were satisfied with their child care arrangements.**

Among program group members who had a child age 12 or younger and who reported attending orientation, 19 percent of survey respondents reported receiving subsidized child care during the 12-month follow-up period. The survey also asked program group members about their use of child care while participating in their most recent Project Independence activity. Eleven percent of the respondents indicated that they relied on Project Independence-subsidized child care, and more than half (55 percent) reported that they relied on family or friends and did not have to pay for the care. The remainder (33 percent) said they paid for child care out of their own pockets.

Regardless of the child care arrangements they used while participating in their most recent activity, 87 percent of the respondents reported that they were very satisfied with the convenience, safety, cost, and availability of those arrangements.

<u>To what extent did participation patterns differ for groups defined by the age of their youngest child?</u>

- **On most of the measures of program participation, those with preschoolage children were engaged in Project Independence at about the same level as those whose youngest child was age six or older.**

Table 1 shows that more than 75 percent of both groups attended orientation and that more than half of those from both groups who attended orientation participated in at least one activity. Among those who attended orientation, 60 percent of those whose youngest child was age six or older participated in at least one activity compared to 52 percent of those with preschoolage children. Once they began participating in the program, however, the two groups received similar services and remained in these activities for similar lengths of time.

- **Child care problems may have interfered with participation in Project Independence, particularly for those with preschoolage children during the period when the availability of subsidized child care was reduced.**

Thirty percent of the survey respondents reported that they had had to miss time in their most recent Project Independence activity because of some type of child care problem. This was true for 32 percent of those with preschoolage children and 23 percent of those with older children.

There is also some evidence to suggest that reductions in child care availability may be associated with some of the differences in participation patterns that emerged over time between the two groups. For example, their participation patterns were similar prior to January 1991, when HRS began to reduce the availability of child care for program participants because of budget constraints. However, after that point, those with preschoolage children were less likely to attend orientation and participate in activities than those whose youngest child was age six or older. For example, from the earlier to the later period, the orientation attendance rate among those with preschoolage children declined (from 80 percent to 72 percent), while it increased slightly for those with older children (from 78 percent to 83 percent). Also, the rate of participation in other activities remained constant (at 39 percent) for those with preschoolage children, while it increased more dramatically (from 43 percent to 57 percent) for those whose youngest child was age six or older.

Did Project Independence produce impacts in the first year of follow-up?

- **Project Independence increased the first-year earnings of those in the program group by an average of almost 7 percent and increased overall employment rates by just over 5 percent.**

During the year after random assignment, program group members – including those who did not work at all – earned an average of $2,540,[1] which is $157 (6.6 percent) more than the control group average of $2,383 (see Table 2). A total of 55 percent of all program group members were employed at some point during that year, which is nearly 3 percentage points (5 percent) higher than the control group's employment rate. As indicated by the asterisks in Table 2, these results were statistically significant, meaning that one can have a high level confidence that they were due to the program rather than to statistical chance.

- **Project Independence decreased the first-year AFDC payments for those in the program group by an average of almost 7 percent and decreased the percentage of program group members receiving AFDC at the end of the follow-up period by just over 6 percent.**

During the year after random assignment, program group members received an average of $2,174 in AFDC payments, which is $157 (6.7 percent) less than the control group average of $2,331 (see Table 2). During the last quarter of the follow-up period (quarter 5), 64 percent of the program group members received AFDC payments, which is 4 percentage points (6 percent) lower than the rate for the control group. These results were also statistically significant (see Table 2).

Did impacts persist after the first year of follow-up?

- **Project Independence produced impacts on earnings and AFDC payments through 18 months of follow-up for the portion of the research sample that entered the study early on.**

For program group members who entered the study early on (and for whom, consequently, follow-up data longer than one year are available), Project Independence increased average 18-month earnings by $392 (an 11 percent increase over the control group average 18-month earnings of $3,604). This is substantially higher than the earnings impact for this early group in the first year alone ($234). Project Independence also reduced average 18-month AFDC payments by $193 (a 6 percent decrease from the

[1]When these earnings are averaged over those program group members who were actually employed (including those who worked only part-time or for part of the year), they are considerably higher: $4,593 per worker.

TABLE 2

FIRST-YEAR IMPACTS ON EMPLOYMENT, EARNINGS, AFDC RECEIPT, AND AFDC PAYMENTS FOR THE FULL SAMPLE

Outcome and Follow-up Period	Program Group	Control Group	Difference	Percentage Change
Ever employed (%)				
Quarter 2	36.5	33.8	2.7 ***	8.0%
Quarter 3	37.2	34.7	2.5 ***	7.2%
Quarter 4	36.6	34.9	1.7 **	4.8%
Quarter 5	36.5	34.3	2.2 ***	6.4%
Total (quarters 2-5)	55.3	52.5	2.8 ***	5.3%
Average total earnings ($)				
Quarter 2	507	484	23	4.8%
Quarter 3	642	579	63 ***	10.9%
Quarter 4	678	648	30	4.7%
Quarter 5	713	673	40 *	5.9%
Total (quarters 2-5)	2,540	2,383	157 **	6.6%
Ever received any AFDC payments (%)				
Quarter 2	79.6	81.7	-2.1 ***	-2.6%
Quarter 3	72.2	76.3	-4.1 ***	-5.4%
Quarter 4	66.7	71.6	-4.9 ***	-6.8%
Quarter 5	64.3	68.6	-4.3 ***	-6.3%
Total (quarters 2-5)	85.1	86.7	-1.6 ***	-1.8%
Average total AFDC payments received ($)				
Quarter 2	619	648	-29 ***	-4.4%
Quarter 3	535	580	-44 ***	-7.7%
Quarter 4	513	560	-47 ***	-8.4%
Quarter 5	507	543	-37 ***	-6.7%
Total (quarters 2-5)	2,174	2,331	-157 ***	-6.7%
Sample size (total = 18,233)	13,509	4,724		

NOTES: Dollar averages include zero values for sample members not employed and for sample members not receiving welfare. Estimates are regression-adjusted using ordinary least squares, controlling for pre-random assignment characteristics of sample members. Rounding may cause slight discrepancies in calculating sums and differences.

A two-tailed t-test was applied to differences between the program and control groups. Statistical significance levels are indicated as *** = 1 percent; ** = 5 percent; * = 10 percent.

control group's average 18-month AFDC payments of $3,235). This is also higher than the first-year AFDC payments impact ($136) for this group.

<u>What were Project Independence's first-year effects for parents of preschoolage children and for those with schoolage children?</u>

- **Project Independence produced AFDC savings for single parents with preschoolage children as well as for those with no preschoolage children. However, the increases in first-year earnings were concentrated among those with no preschoolage children.**

These findings on program impacts for parents of preschoolage children are the first available for a mandatory JOBS program. Table 3 shows that Project Independence produced similar and statistically significant reductions in first-year AFDC payments for program group members with children between the ages of three and five ($134) and for those whose youngest child was age six or older at the time of random assignment ($175). The impacts on average first-year earnings were only $74 (not statistically significant) for those with preschoolage children compared to $280 (statistically significant) for those with older children. Overall, however, the differences in earnings and AFDC payments impacts between the two groups were not statistically significant. This means that, although there were differences, they were not large enough to be interpreted as a reliable estimate of the program's relative effectiveness for these two groups.

<u>What were Project Independence's first-year effects for those the program defined as job-ready and for those it defined as not job-ready?</u>

- **Project Independence's first-year impacts on earnings and AFDC payments were concentrated among those defined as job-ready.**

Table 3 shows that Project Independence produced first-year earnings gains ($207) and AFDC payments reductions ($176) for those defined as job-ready under the criteria used by the program when the research sample was identified: possession of a high school diploma or GED and employment in at least 12 of the 36 months prior to random assignment. There were no statistically significant first-year impacts on earnings or AFDC payments for those defined as not job-ready. However, the differences in first-year impacts on earnings and AFDC payments between the two groups were not statistically significant. This means that differences in first-year impacts were not large enough to be interpreted as a reliable estimate of the program's relative effectiveness for these two subgroups. In addition, although not shown in Table 3, the program did not produce first-year impacts for those who were defined as job-

TABLE 3

FIRST-YEAR IMPACTS ON EARNINGS AND AFDC PAYMENTS
FOR SELECTED SUBGROUPS BASED ON CHARACTERISTICS AT THE TIME OF RANDOM ASSIGNMENT

Subgroup and Follow-up Period	Average Earnings: Program Group ($)	Average Earnings: Control Group ($)	Average Earnings: Difference ($)	Average Earnings: Percentage Change	Average AFDC Payments Received: Program Group ($)	Average AFDC Payments Received: Control Group ($)	Average AFDC Payments Received: Difference ($)	Average AFDC Payments Received: Percentage Change
Youngest child, 3 to 5 years old								
Quarter 5	644	619	25	4.0%	563	588	-25 **	-4.3%
Total (quarters 2-5)	2,266	2,192	74	3.4%	2,379	2,513	-134 ***	-5.3%
Youngest child, age 6 or older								
Quarter 5	772	699	73 **	10.4%	463	511	-48 ***	-9.4%
Total (quarters 2-5)	2,777	2,497	280 ***	11.2%	2,034	2,209	-175 ***	-7.9%
Job-ready (a)								
Quarter 5	775	719	56 **	7.8%	492	538	-46 ***	-8.6%
Total (quarters 2-5)	2,762	2,555	207 ***	8.1%	2,119	2,295	-176 ***	-7.7%
Not job-ready (a)								
Quarter 5	282	288	-6	-2.1%	566	586	-20	-3.4%
Total (quarters 2-5)	1,027	1,015	12	1.2%	2,446	2,552	-106	-4.2%
First-time applicant for AFDC								
Quarter 5	845	842	3	0.4%	412	452	-40 ***	-8.8%
Total (quarters 2-5)	2,957	2,898	59	2.0%	1,818	1,974	-156 ***	-7.9%
Received AFDC less than 2 years (b)								
Quarter 5	676	642	34	5.3%	528	572	-44 ***	-7.7%
Total (quarters 2-5)	2,505	2,355	150	6.4%	2,240	2,449	-209 ***	-8.5%
Received AFDC 2 years or more (b)								
Quarter 5	553	431	122 ***	28.3%	620	669	-49 ***	-7.3%
Total (quarters 2-5)	1,966	1,548	418 ***	27.0%	2,618	2,795	-177 ***	-6.3%

NOTES: Dollar averages include zero values for sample members not employed and for sample members not receiving welfare. Estimates are regression-adjusted using ordinary least squares, controlling for pre-random assignment characteristics of sample members. Rounding may cause slight discrepancies in calculating sums and differences.

A two-tailed t-test was applied to differences between the program and control groups. Statistical significance levels are indicated as *** = 1 percent; ** = 5 percent; * = 10 percent.

(a) Sample members are defined as "job-ready" if they had completed at least 10th grade or were employed for at least 12 of the 36 months prior to random assignment. Sample members are defined as "not job-ready" if they had not completed 10th grade and were employed for less than 12 of the 36 months prior to random assignment. These definitions are based on the criteria used by Project Independence during the random assignment period.

(b) This subgroup includes both applicants and recipients, and refers to the total number of months accumulated from one or more spells on an individual's own or spouse's AFDC case. It does not include AFDC receipt under a parent's name.

ready under the program's original job-readiness criteria, but who did not have a high school diploma or GED (and thus would be considered not job-ready under the revised criteria).

Caution should be used in drawing policy implications and operational lessons from the first-year results for the not job-ready group because many of these individuals participated in education or training activities, the effects of which may not be realized until after the first year of follow-up. The job-ready group with no high school diploma or GED may also experience impacts later.

<u>What were Project Independence's first-year effects on groups with different histories of AFDC receipt?</u>

- **Project Independence produced relatively large increases in first-year earnings, and a reduction in first-year AFDC payments, for those who had previously received AFDC for two years or more. The program produced reductions in first-year AFDC payments for first-time applicants and for applicants and recipients who had previously received AFDC for less than two years, but it did not produce first-year earnings impacts for these two groups.**

Table 3 shows that Project Independence produced statistically significant reductions in first-year AFDC payments for all three groups defined by their previous receipt of AFDC: first-time AFDC applicants ($156), applicants and recipients who had received AFDC for a total of less than two years ($209), and applicants and recipients who had received AFDC for a total of two years or more ($177). However, the program produced statistically significant impacts on average first-year earnings ($418, which represents a 27 percent increase over the control group average) only for those who had previously received AFDC for two years or more. The differences in first-year earnings impacts among the three groups were statistically significant, indicating that the program was substantially more effective in increasing earnings for those who received AFDC for two years or more than it was for first-time applicants or those with less than two years of prior receipt.

<u>Were the first-year impacts concentrated in particular counties?</u>

- **Earnings gains and welfare savings were widespread across the research counties, although the estimated impacts varied in magnitude.**

Impacts on first-year earnings were positive for all the counties except Duval, although they were statistically significant only for Orange and Broward. Although not statistically significant, the first-year impacts on earnings for Lee and Bay (the counties with the smallest research samples) were fairly large (and larger than those for Broward).

Project Independence produced reductions in first-year AFDC payments for all nine research counties, and these were statistically significant for Broward, Dade, Duval, Hillsborough, Lee, and Orange. Broward, Lee, and Orange achieved the largest AFDC reductions. Earnings gains exceeded AFDC payments reductions in all counties except Duval and Hillsborough.

While the estimated impacts did appear to vary across the counties, the overall differences in first-year impacts across counties were not statistically significant and were not large enough to be interpreted as reflecting the relative effectiveness of the programs. In fact, relative consistency in effects across the counties shows that the overall impacts were not being driven by the performance of any single county or even by a small group of counties. This may be a reflection, in part, of the centralized administration of the program, which tended to create greater consistency in the program philosophy and operating procedures than might be found in a county-administered system. However, since the counties and programs did differ along several dimensions (e.g., labor market conditions, service emphasis, and relationships with local service providers and employers), larger differences in effects may emerge as longer-term follow-up data become available.

<u>How did the first-year impacts of Project Independence compare to those of other JOBS programs?</u>

- **Project Independence's impact on first-year earnings for those whose youngest child was age six or older was similar in magnitude to the first-year earnings impact produced by California's JOBS program for the same group, while its impact on first-year AFDC payments was smaller.**

To provide a context for gauging the magnitude of Project Independence's first-year impacts, it is useful to compare them with those generated by other JOBS programs. Another important random assignment evaluation of a JOBS program for which there are comparable data is the study of California's Greater Avenues for Independence (GAIN) Program.[2] However, several important differences in the research designs used, research samples, program models, and environments of the two states suggest caution. First, as noted earlier, random assignment for the Project Independence evaluation took place at the point of AFDC application or assessment of continuing AFDC eligibility, whereas in the GAIN evaluation, random assignment took place at orientation. Second, the Project Independence research sample includes a much higher proportion of AFDC applicants and reapplicants than does the GAIN

[2]For the most recent findings from the evaluation of GAIN, see Daniel Friedlander, James Riccio, and Stephen Freedman, *GAIN: Two-Year Impacts in Six Counties* (New York: Manpower Demonstration Research Corporation, 1993). The comparison presented here focuses only on the group the two studies have in common at this point: single parents whose youngest child was six years old or older at the time they entered the study.

research sample, suggesting that the Project Independence sample may be somewhat more "advantaged," on average, than the GAIN sample. Third, during the study period, Project Independence emphasized services intended to move program registrants rapidly into employment. GAIN, in contrast, mandated basic education for a large share of its registrants. Finally, Florida and California differ in their AFDC grant levels and labor market characteristics, which means that the Project Independence and GAIN participants faced very different incentives and opportunities to supplement or replace welfare with earnings.

Table 4 shows that Project Independence and GAIN produced quite similar increases in first-year earnings for single-parent AFDC applicants and recipients whose youngest child was age six or older: \$280 for Project Independence compared to \$266 for GAIN.[3] The percentage increase for Project Independence (11.2 percent) was somewhat smaller than GAIN's (16.2 percent), in part because the Project Independence control group had substantially higher first-year earnings (\$2,497) than did the GAIN control group (\$1,642).

Project Independence's impact on reducing first-year AFDC payments (\$175) was smaller than GAIN's (\$283), but the percentage decrease for Project Independence (7.9 percent) was larger than GAIN's (4.5 percent). This results, in part, from the fact that the Florida AFDC grant levels – and, thus, the average first-year AFDC payments for the Project Independence control group (\$2,209) – were substantially smaller than the California AFDC grant levels – and, thus, the average first-year AFDC payments for the GAIN control group (\$6,247).

Because of the differences in research designs and samples, program models, and environments noted above, Table 4 should not be used to judge the relative effectiveness of the two states' programs. It does, however, provide a general indication that two large state JOBS programs both produced positive first-year results. Moreover, in California, impacts increased after the first year, and there is some evidence that the first-year gains for Project Independence may persist into the future as well.

* * *

In summary, Project Independence successfully implemented its participation mandate and produced earnings gains and AFDC savings over the first year of follow-up. However, it is too soon to say

[3]There was considerable variation among the six counties participating in the evaluation of GAIN, with Riverside having consistently large impacts and Tulare having virtually no statistically significant impacts (see Friedlander, Riccio, and Freedman, 1993).

TABLE 4

A COMPARISON OF FIRST–YEAR IMPACTS
FOR PROJECT INDEPENDENCE AND CALIFORNIA'S GAIN PROGRAM,
FOR SINGLE PARENTS WHOSE YOUNGEST CHILD WAS AGE SIX OR OLDER

Program and Outcome	Program Group ($)	Control Group ($)	Difference ($)	Percentage Change
Project Independence				
Average first–year earnings	2,777	2,497	280 ***	11.2%
Average first–year AFDC payments received	2,034	2,209	–175 ***	–7.9%
GAIN				
Average first–year earnings	1,908	1,642	266 ***	16.2%
Average first–year AFDC payments received	5,964	6,247	–283 ***	–4.5%

NOTES: In Project Independence, random assignment occurred at the Assistance Payments Unit, prior to orientation. The impact estimates for Project Independence reflect the average of the impacts for the nine research counties, which were weighted by the size of their research sample.

In GAIN, random assignment occurred at orientation. The impact estimates for GAIN reflect the average of the impacts for the six research counties, which were weighted equally.

Dollar averages include zero values for sample members not employed and for sample members not receiving welfare. Estimates are regression–adjusted using ordinary least squares, controlling for pre–random assignment characteristics of sample members. Rounding may cause slight discrepancies in calculating sums and differences.

A two–tailed t–test was applied to differences between the program and control groups. Statistical significance levels are indicated as *** = 1 percent; ** = 5 percent; * = 10 percent.

whether the relatively modest first-year results will translate into larger impacts in the future. Longer-term follow-up will be essential to assess this and to determine whether future effects will extend to the groups that did not experience effects from the program in the first year. Thus, policymakers and administrators should be cautious in drawing conclusions from this report about the relative effectiveness of Project Independence for different groups or about the full payoff of the program.

The final report from this evaluation will present Project Independence's impacts over a longer follow-up period and will reexamine the relative effectiveness of the program for the key groups discussed in the present report. It will also draw upon a survey of research sample members to examine the program's effects on other outcomes (such as educational attainment and the quality of jobs people obtain), estimate its benefits and costs, and explore the role of other factors that may contribute to Project Independence's effectiveness in moving AFDC recipients into jobs and toward self-sufficiency.

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About MDRC

The Manpower Demonstration Research Corporation (MDRC) is a nonprofit social policy research organization founded in 1974 and located in New York City and San Francisco. Its mission is to design and rigorously field-test promising education and employment-related programs aimed at improving the well-being of disadvantaged adults and youth, and to provide policymakers and practitioners with reliable evidence on the effectiveness of social programs. Through this work, and its technical assistance to program administrators, MDRC seeks to enhance the quality of public policies and programs. MDRC actively disseminates the results of its research through its publications and through interchange with policymakers, administrators, practitioners, and the public.

Over the past two decades – working in partnership with more than forty states, the federal government, scores of communities, and numerous private philanthropies – MDRC has developed and studied more than three dozen promising social policy initiatives.