

MEMO TO: Bruce Reed
Kathi Way

FROM: Helene Grady, staff, WRWG

SUBJECT: California Attendance for WG members

DATE: September 15, 1993

Jeremy asked me to send you this list of WG members who will attend the California hearing and those who will not. He also asked to please note the agencies which will not be represented, especially Education and Labor.

CONFIRMED GOING:

David Ellwood
Mary Jo Bane
Robert Carver
Kathi Way
Bruce Reed
Jeff Watson
Walter Broadnax
Fernando Torres-Gil
Ken Apfel -- only on 7th
Maurice Foley
Michael Stegman

CONFIRMED NOT GOING:

Madeleine Kunin
Wendell Primus
Doug Ross
Ray Cortines
Alicia Munnell
Eugene Sperling
Thomas Glynn
Eli Segal
Joseph Stiglitz
Isabel Sawhill
Joycelyn Elders
Ellen Haas
Elaine Kamarck

NOT CONFIRMED EITHER WAY:

Eleanor Acheson

DEPARTMENT OF HEALTH & HUMAN SERVICES

Office of the Secretary

Washington, D.C. 20201

October 4, 1993

MEMORANDUM TO: Bruce Reed

FROM: Margaret Pugh

SUBJECT: Invited California State Officials for Welfare Reform Event October 7 - 8

cc: Jeremy Benami

Per your request, attached are lists of elected officials invited to our two intergovernmental outreach events. The Thursday meeting will be for county officials, the Friday meeting for state legislators. Due to the legislature being out of session and because of the holiday weekend, many of these officials will be unavailable; however, all have been notified of our events and given the opportunity to send a key staff member as a surrogate.

There are two additions to the list of county officials. The L.A. County Board of Supervisors has been notified of the Thursday morning meeting and are likely to send a representative. San Diego and Riverside Counties also are aware of the event.

For the hearing, Governor Wilson, Pro Tempore Roberti and Speaker Brown were invited to give welcoming remarks or to send a surrogate to speak on their behalf. The six intergovernmental groups were invited to recommend witnesses for our California officials' panel; panelists soon will be confirmed.

The San Francisco and Sacramento Mayors' offices have been notified of our visit, as have the offices of John Garamendi and Kathleen Brown. In keeping with our handling of earlier events in Chicago and New Jersey, these gubernatorial candidates have not been invited to participate in the hearing.

Attachments

INVITED STATE LEGISLATORS FOR WORKING GROUP MEETING
October 8, 8:00 a.m.
Sacramento City College Auditorium, Classroom A-9

Staff representatives are in parentheses.

STATE SENATE

Senate Pro Tempore Dave Roberti (David Panush)

Majority Leader Mello

Minority Leader Kenneth Maddy (Stan Neal)

Senator Dianne Watson (Sarah McCarthy) - Chair, Health and Human Services Cmte.

Senator Mike Thompson - Chair, Budget Subcmte. (AFDC issues).

Senator Al Alquist - Chair, Budget and Fiscal Review Cmte.

Senator Leroy Green - Site visit in his district.

Senator Gary Hart - Chair, Education Committee. Leading advocate of child support enforcement. Recently carried legislation on food stamps and nutrition programs.

Senator Teresa Hughes - Chair, Select Cmte. on Teenage Pregnancy

Senator Pat Johnston - Chair, Industrial Relations Cmte.

Senator Tim Leslie - Carried Governor's welfare reform proposal.

Senator Bill Lockyer - Chair, Judiciary Cmte.

Senator Dan McCorquodale - Carried GAIN legislation.

Senator Nick Petris - Chair, Budget Subcmte. (education).

Senator Bob Presley - Chair, Appropriations Cmte.

STATE ASSEMBLY

Speaker Willie Brown (Patsy Kurakowa)

Minority Leader Jim Brulte (Wes Larson)

Assemblyman Tom Bates (Carol Wallisch)

Assemblywoman Marguerite Archie-Hudson - Member, Human Services Cmte.

Assemblywoman Valerie Brown - Member, Human Services Cmte.

Assemblyman John Burton - Site visit in his district.

Assemblyman Robert Campbell - Site visit in his district.

Assemblywoman Delaine Eastin - Former chair of GAIN Select Cmte.

Assemblywoman Barbara Friedman - Ways & Means Subcmte. Chair on Health and Human Services

Assemblywoman Barbara Lee - Site visit in district.

Assemblyman Richard Polanco - Leader on welfare and immigration.

Chair of Hispanic Congressional Caucus.

Assemblyman Curt Pringle - Member, Human Services Cmte.

Assemblywoman Margaret Snyder - Member, Human Services Cmte.

Assemblyman Nao Takasugi - Member, Human Services Cmte.

Assemblyman John Vasconcellos - Chair, Ways & Means Cmte.

List of County Attendees
Breakfast With Welfare Reform Working Group

County Welfare Directors

John Cullen	Merced County
Konnie Lewin	Yuba County
Ray Merz	Placer County
Richard O'Neil	Santa Clara County
Yolanda Rinaldo	Sonoma County
Cecil Steppe	San Diego County (Invited by Working Group)

County Supervisors

Grantland Johnson	Sacramento County
Susan Lacy	Ventura County
Kevin Shelley	San Francisco County
Barbara Shipnuck	Monterey County
Helen Thomson	Yolo County

County Administrator

Paul McIntosh	El Dorado County
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Staff

Frank Mecca	County Welfare Directors Association
Karen Keeslar	Ca. State Association of Counties

BRUCE REED
October 7-9, 1993
San Francisco, CA

October 7, 1993

7:45a Depart Dulles on United Flight 27

10:27a Arrive San Francisco, CA

You will be picked up at the airport -- someone will meet you at the gate and will have your FINAL briefing book

Hotel reservations:

The Sacramento Hilton
2200 Harvard Street
Sacramento, CA

Phone: (916) 922-4700

Confirmation No: 193968684 (not guaranteed)

*Cancelled
w/ Sherri 9:50*

October 8, 1993

Hotel reservations:

The Fairmont Hotel
950 Mason Street
San Francisco, CA 94108

Phone: (415) ⁷⁷²⁻⁵⁰⁰⁰~~722-5000~~

No confirmation number; room is being held

October 9, 1993

8:53a Depart San Francisco on United Flight 964

4:46p Arrive Dulles



REED / BRUCE
AIRLINE TICKET REFUND RECEIPT

098868

DATE
10-13-93

VALIDATING CARRIER	TICKET NUMBER	COUPON(S)
UA	1340 350 279	1,2

This is to acknowledge receipt of the above mentioned Airline Ticket(s) submitted for refund.

REFUND	PENALTY	NET REFUND	F.O.P.	
\$	\$	\$	Check:	Credit Card:

The above tickets will be forwarded to the American Express Office of issuance, who will process the refund. Thank you.

ORIGINAL

TR-2588 (8/89) Ptd. in USA

RECEIVED BY:

M. Stevenson

888880

REFUND RECEIPT DISTRIBUTION

ORIGINAL COPY (WHITE) WILL BE GIVEN TO THE CUSTOMER AS A RECEIPT FOR THEIR TICKETS.

DUPLICATE COPY (BLUE) FORWARD TO THE ISSUING OFFICE WITH THE RETURNED FLIGHT COUPON(S).

TRIPPLICATE COPY (YELLOW) REMAINS AS PERMANENT RECORD IN THE OFFICE THAT ISSUED THE RECEIPT.



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Arlington, Virginia 22209-1901

INVOICE / ITINERARY

WLEB PERSON# 44 ITINERARY/INVOICE NO. 0002425 DATE: 06 OCT 93
 CUSTOMER REF: 9N0023 NY05PL PAGE: 01

TO: WHITE HOUSE TRAVEL
 1600 PENNSYLVANIA AVE
 WASH DC 20500

REF: KCSX04R44 REF: KCSX04R44

6 OCT 93 - THURSDAY
 AIR: UNITED AIRLINES FLT: 27 COACH BREAKFAST
 LV WASHINGTON DULLES 745A EUP: BOEING 767
 AR SAN FRANCISCO 1027A NON-STOP
 REED/BRUCE SEAT-10G

7 OCT 93 - SATURDAY
 AIR: UNITED AIRLINES FLT: 934 COACH BREAKFAST
 LV SAN FRANCISCO 0530A EUP: BOEING 747
 AR WASHINGTON DULLES 0448P NON-STOP
 OTHER SAN FRANCISCO

AISLE SEAT UNAVAILABLE CONFIRMED MIDDLE

8 JAN 94 - WEDNESDAY
 OTHER WASHINGTON
 HAVE A GREAT TRIP

TR TICKET	061340350279	REED BRUCE	600.00
		SUB TOTAL	600.00
		TOTAL AMOUNT DUE	600.00

FOR AFTER HOUR EMERGENCIES,
 CALL 800-847-0242/YOUR HOTLINE CODE IS S-KC52

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THANK YOU FOR TRAVELING WITH AMERICAN EXPRESS.

*Cancelled
 @ 7:05*

NY05PL
 06-249093 KC52

**EXECUTIVE OFFICE OF THE PRESIDENT
OFFICIAL TRAVEL AUTHORIZATION**

(Privacy Act Statement and Instructions on back)

1. TYPE OF AUTHORIZATION

TDY Amendment
(Show items amended)

Invitational
(Non-EOP Employees Only) Relocation

4. AGENCY/DIVISION
Office of Policy Development - DPC

7. Per Diem
 Actual Subsistence (unusual circumstances)*
Rate(s):

2. Traveler (First name, middle initial, last name)
Bruce Reed

3. Title of Traveler
Deputy Assistant to the President
for Domestic Policy

5. Office Phone 456-6515 **6. Official Duty Station** Washington, DC

8. TRAVEL INFORMATION

PURPOSE: To participate in the public hearing and site visits of the Welfare Reform Working Group.

DATE(S): Travel Begin On 10 / 7 / 93 Travel End On 10 / 9 / 93

ITINERARY: Point of Origin (City, State) Washington, DC
Place(s) of Official Visitation (City, State) San Francisco, CA
Sacramento, CA
Point of Return (City, State) Washington, DC

9. MODE OF TRAVEL					10. ESTIMATED COST		AMOUNT
(a) Commercial Transportation					Per Diem/Actual Subsistence		\$ 236.00
Rail		Air			Transportation		600.00
Coach	Extra Fare*	Coach/Tourist	Business*	First Class†	Rental Car		--
		X			Miscellaneous		150.00
† First Class must have approval of Agency Head or Deputy							
(b) Privately Owned Vehicle					TOTAL		\$ 986.00
Auto	Other	Rate with per mile	<input type="checkbox"/> Determined more advantageous to government*		11: SPECIAL EXPENSE AUTHORIZED		
			<input type="checkbox"/> For convenience of traveler, NTI; common carrier cost		<input type="checkbox"/> Registration Fees (meeting, training, etc.)		
(c) <input type="checkbox"/> Gov't Owned Vehicle					<input type="checkbox"/> Commercial Rental Car		
(d) <input type="checkbox"/> Other (specify)					<input type="checkbox"/> Excess Baggage not to exceed		
					<input type="checkbox"/> Other (Please identify)		
					12. ADVANCE REQUESTED		\$
					<i>(meals and miscellaneous expense only)</i>		

13. * Special Provisions/Remarks *(Justification for first class/business/extra fare travel, annual leave enroute, actual subsistence, etc.)*

14(a) Requested by
Bruce Reed

15. Accounting data *(Appropriation, division, project, vendor number)*

14(b) I certify that the travel herein was reviewed and determined to be essential for the accomplishment of agency programs and missions.
Approval Official *(Signature and Title)*

16. Funds are available to defray travel cost specified above.
Funds Manager's Certification *(Signature)*

17. Date **18. Travel Authorization No.**

PRIVACY ACT STATEMENT --- The information requested is required to document the authorization and reimbursement of the individuals who travel at government expense on official business. Its routine use is restricted to officers and employees of Executive Office of the President agencies for performance of their official duties. Disclosure is voluntary, but failure to provide all or part of the information may delay or prevent authorization of travel. This information is collected under the authority of 31 U.S.C. 66a, 41 U.S.C. 3101, 3102, 3309; and General Accounting Office and General Services Administration policies and procedures.

Instructions for Completing Travel Authorization

- ITEM 1 --- Check:
TDY block if travel is of routine nature by an employee of your agency.
Invitational block if travel is to be performed by a person who is not employed by your agency.
Relocation block if authorization is for a person being transferred from or to another geographical locality.
Amendment block if making change to existing Travel Authorization.
- ITEMS 2 - 6 --- Self Explanatory.
- ITEM 7 --- Check appropriate box for the type of reimbursement authorized.
List rate or rates applicable.
- ITEM 8 --- Provide information on travel itinerary.
- ITEM 9 --- Check mode of travel authorized.
- ITEM 10 --- Compute cost of per diem or actual subsistence utilizing the information in **Item 10**.
Transportation is cost of airline ticket, privately owned vehicle mileage, or other transportation cost.
Miscellaneous could include rental car, registration fees, taxi cabs, etc.
- ITEM 11 --- Check appropriate box for any special expenses authorized.
- ITEM 12 --- Complete **only** if an advance of funds is requested.
- ITEM 13 --- Space provided for justifications and other miscellaneous information.
- ITEM 14(a) --- Signature of Traveler.
14(b) --- Signature of Approving Official.
- ITEMS 15 & 16 --- Self Explanatory.
- ITEMS 17 & 18 --- To be completed by personnel assigning T/A numbers.

BRUCE REED
October 7-9, 1993
San Francisco, CA

October 7, 1993

7:45a Depart Dulles on United Flight 27

10:27a Arrive San Francisco, CA

You will be picked up at the airport -- someone will meet you at the gate and will have your FINAL briefing book

Hotel reservations:

The Sacramento Hilton
2200 Harvard Street
Sacramento, CA

Phone: (916) 922-4700

Confirmation No: 193968684 (not guaranteed)

October 8, 1993

Hotel reservations:

The Fairmont Hotel
950 Mason Street
San Francisco, CA 94108

Phone: (415) 722-5000

No confirmation number; room is being held

October 9, 1993

8:53a Depart San Francisco on United Flight 964

4:46p Arrive Dulles

TO: Welfare Reform Communications Work Group

FROM: Jeremy Ben-Ami
Jim Hickman *SM*

RE: California Public Forum on Welfare Reform

DATE: September 14, 1993

The purpose of this memo is to outline the options for our upcoming visit to California. The political challenges in New Jersey will vastly increase in California. We hope to get a head start by coming up with a site and schedule early this week and beginning outreach efforts as soon as possible.

Schedule

We are tentatively scheduled to visit California on Wednesday, October 6 and Thursday, October 7. Recent discussions with staff have indicated a desire to reschedule this visit to Thursday, October 7 and Friday, October 8. This schedule change would make it easier for members of the California Congressional delegation to attend the hearing and for members to coordinate travel plans.

Itinerary

Also under discussion is the itinerary of our visit. We will focus the morning session of the hearing on the lessons of the GAIN program for the development of a national reform program, and reserve the afternoon for more general discussion of welfare reform issues.

There are currently two options for sites under review. The first option is Southern California:

DAY ONE, a.m. -- Riverside county: GAIN site visit

DAY ONE, p.m. -- Los Angeles: focus groups on the South/East Side of L.A.

DAY TWO -- public hearing at LA Community College

The second option is Northern/Central California:

DAY ONE, a.m. -- Alameda county GAIN program

DAY ONE, p.m. -- focus groups in Oakland of GAIN participants

DAY TWO -- public hearing (Options: Sacramento, Oakland, San Jose)

We can probably have as fruitful a visit from an "information gathering" standpoint in either the south or the north, so this should not be a factor. The decision then becomes whether we are better off politically in one or the other. Some frame the issue in terms of traditional inner city (L.A.) versus fast growing suburb (San Jose/Sacramento). Others frame it in relation to the immigration issue which will likely be hotter in the south. Finally, the level of interest from elected officials will most likely be greater here and we will have to make tough choices regarding their participation in the visit.

For those of you unable to make the meeting to discuss this decision on Tuesday, please call either Jim (401-6958) or Jeremy (401-6954) by the end of the day Tuesday with your input. We will decide on Wednesday.

cc: Mary Jo Bane
David Ellwood
Bruce Reed

WORKING GROUP ON WELFARE REFORM, FAMILY SUPPORT AND INDEPENDENCE

FACSIMILE TRANSMISSION COVER SHEET

Aerospace Building
370 L'Enfant Promenade, S.W.
Seventh Floor
Washington, D.C. 20447
Fax: (202) 205-9688

Date: 9/21

To: <u>Cathy Mays</u>	From: <u>Helene Brady</u>
Phone: _____	Phone: <u>401-4886</u>
Fax: <u>456-7028</u>	Fax: <u>5 pgs.</u>

Message: _____
Please call to confirm receipt.

TO: Welfare Reform Working Group Members & Staff
 FROM: Jim Hickman
 Welfare Reform Working Group
 RE: Hearing Schedule and Travel Information
 DATE: September 20, 1993

 Here is the updated hearing schedule for the WRWG as of 9/20/93:

Chicago:	August 10-August 11	completed
Washington, D.C.:	August 19 & 20	completed
New Jersey:	September 9-September 10	completed
California:	October 7-October 8	confirmed
Tennessee:	November 8-November 9	tentative

For the California visit on October 7 & 8:

- * Everyone should plan on leaving Washington on Wednesday afternoon, October 6, and returning on a red-eye flight Friday evening/Saturday morning, October 8, if you are needed back in D.C. immediately after the hearing. Shuttles will be available from Sacramento to the S.F. airport at the end of the hearing.

The recommended flight from DC National to SF on 10/6/93 is:

Northwest Flt. 233 DC-Detroit-S.F. Departing at 4:25 PM.

The recommended return flight from SF on 10/8/93 is:

Northwest Flt. 346 SF-Detroit-D.C. Departing 10:55 PM.

- * The WRWG will be staying at two different hotels during the California visit.

Wednesday, October 6: The Fairmont Hotel
 950 Mason St.
 San Francisco, CA 94108
 (415) 772-5000
 Contact: Nancy Corrine Pelosi

Thursday, October 7: The Sacramento Hilton
 2200 Harvard St.
 Sacramento, CA 95815
 (916) 922-4700
 Contact: Shelly Aboud x1510

Each hotel will receive a pre-reserved roster of formal Working Group members only. Staff will have to call in their own reservations under the Welfare Reform Working Group reservation block.

Welfare Reform Working Group Travel...page two

Working Group members and staff should catch a Supershuttle from S.F. airport to the Fairmont. You will be provided transportation to your hotel in Sacramento at the end of the day on Thursday.

Please send your travel itinerary to Helene Grady. Her phone # is 401-4886 and her fax # is 205-9688. If you have any further questions, please feel free to call me at 401-6958.

Thanks.

DRAFT

NOT FOR DISTRIBUTION OR PUBLICATION

**Working Group on Welfare Reform, Family Support and Independence
California Site Visits and Public Forum
San Francisco/Oakland/Sacramento, California
Wednesday, October 6 - Friday, October 8, 1993**

Tentative Working Group ItineraryWednesday, October 6

Evening Arrive San Francisco
Fairmont Hotel
950 Mason St.
San Francisco, CA 94108
(415) 772-5000

Thursday, October 8

08:30 AM Tentative Breakfast Meeting with Elected Officials
(TBD)

10:00 AM Site visit/staff meeting/focus group at Alameda
County GAIN program with Alameda and S.F. County
GAIN programs;

01:00 PM Lunch, Editorial Board meetings

03:00 PM Site visit/focus group/staff meeting with Contra
Costa County GAIN program

08:00 PM Tentative dinner with Elected Officials in
Sacramento (TBD)

Evening Hilton Inn
2200 Harvard St.
Sacramento, CA 95815
(916) 922-4700

Per Diem =

Lodging 67

Meals 34

total: \$101

(Sacramento)

DRAFT

**Working Group on Welfare Reform, Family Support and Independence
California Public Forum
LOCATION TBD
Sacramento, California
Friday, October 8, 1993**

09:00 AM FORUM BEGINS

09:00 AM Opening Remarks by Working Group Chairs

09:10 AM - Panel One - Overview of the GAIN Program
09:40 AM John Wallace, MDRC
, Director, CA GAIN Program
GAIN Program Participant
Non-GAIN Program Participant

09:45 AM - Panel Two - Lessons from the GAIN Program
12:30 PM

09:45 AM - Question: Human Capital Development vs. Labor
10:45 AM Force Attachment

Larry Townsend, Riverside County GAIN Program
Roger Lum or Kathy Archuleta, Alameda County GAIN
Program
GAIN Program Participant (Human Capital Develop.)
GAIN Program Participant (Labor Force Attachment)
Connie Anderson, GAIN Program Coordinator, CA
Community Colleges
Advocate (Labor Force Attachment)

10:45 AM - BREAK
11:00 AM

11:00 AM - Question: The Role of Child Care
11:40 PM

Patricia Siegel, CA Child Care Resource and
Referral Network
So. CA Child Care Program Director
Kathleen O'Brien, Child Care Law Center
Child Care Program Participant
Child Care Program Participant

11:45 PM - Question: Improving Participation
12:30 PM

LA County GAIN Director
Angela Blackwell, Urban Strategies
Advocate (mandatory participation)
High Participation Program (SWIM San Diego)

12:30 PM - LUNCH
01:30 PM

DRAFT

Page ...two

Working Group on Welfare Reform, Family Support and Independence
California Public Forum
LOCATION TBD
Sacramento, California
Friday, October 8, 1993

01:30 PM - Panel Three - California Elected Officials
02:25 PM

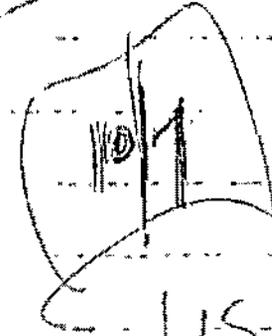
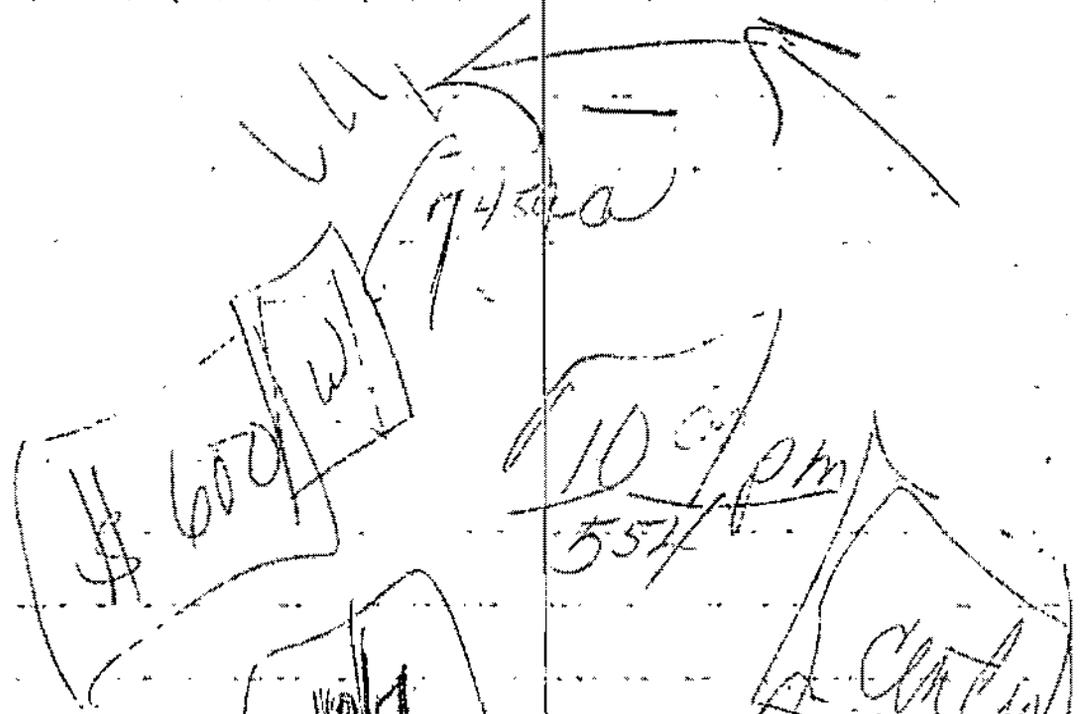
02:30 PM - Panel Four - (Six Panelists T.B.D.)
03:10 PM

03:15 PM - Panel Five - (Six Panelists T.B.D.)
03:55 PM

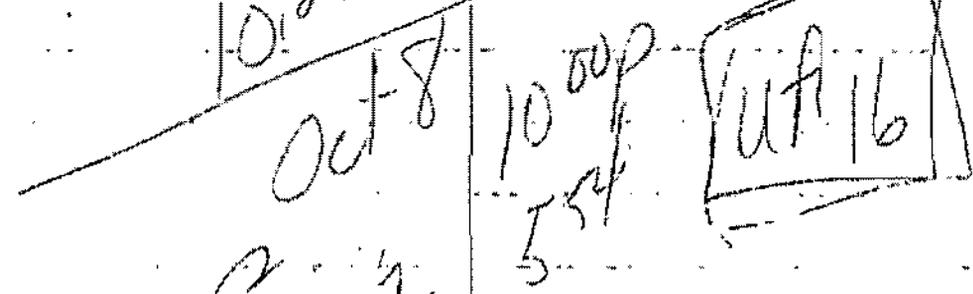
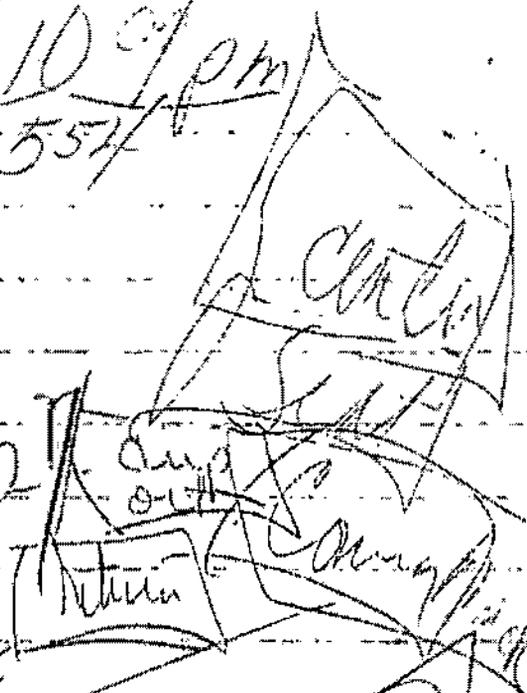
04:00 PM - Open Public Testimony
05:00 PM

05:00 PM - Closing Remarks by Working Group Chairs
05:15 PM

.....



US-2
 1745 @
 10:27 SF



Conf: 193
 684 968
 67



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 Arlington, Virginia 22209-1901

INVOICE / ITINERARY

SALES PERSON: 44
 CUSTOMER NBR: 9N0023

ITINERARY/INVOICE NO. 0002425
 QYQ8PL

DATE: 06 OCT 93
 PAGE: 01

TO: WHITE HOUSE TRAVEL
 1600 PENNSYLVANIA AVE
 WASH DC 20500

FOR: REED/BRUCE

REF: KC5XD4KA4

07 OCT 93 - THURSDAY

AIR UNITED AIRLINES FLT:27 COACH BREAKFAST
 LV WASHINGTON DULLES 745A EQP: BOEING 767
 AR SAN FRANCISCO 1027A NON-STOP
 REED/BRUCE SEAT-10G

09 OCT 93 - SATURDAY

AIR UNITED AIRLINES FLT:964 COACH BREAKFAST
 LV SAN FRANCISCO 853A EQP: BOEING 747
 AR WASHINGTON DULLES 446P NON-STOP
 REED/BRUCE SEAT-43J

OTHER SAN FRANCISCO
 AISLE SEAT UNAVAILABLE CONFIRMED MIDDLE

05 JAN 94 - WEDNESDAY

OTHER WASHINGTON
 HAVE A GREAT TRIP

AIR TICKET	UA1340350279	REED BRUCE	600.00
		SUB TOTAL	600.00
		TOTAL AMOUNT DUE	600.00

FOR AFTER HOUR EMERGENCIES
 CALL 800-847-0242/YOUR HOTLINE CODE IS S-KC52

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.....
 ALL UNUSED TICKETS ARE TO BE RETURNED TO AMERICAN
 EXPRESS OR YOUR TRAVEL COORDINATOR IMMEDIATELY UPON
 RETURN FROM TRAVEL OR WHEN TRIP HAS BEEN CANCELED.

.....
 THANK YOU FOR TRAVELING WITH AMERICAN EXPRESS.

U6-MK10
 U7-24SEP93 KC52

BRUCE REED
October 7-9, 1993

San Francisco, CA

October 7, 1993

7:45a Depart Dulles on United Flight 27

10:27a Arrive San Francisco, CA

You will be picked up at the airport

Hotel reservations:

The Sacramento Hilton
2200 Harvard Street
Sacramento, CA

Phone: (916) 922-4700

Confirmation No: 193968684
for two nights

October 9, 1993

8:53a Depart San Francisco on United flight 964

4:46p Arrive Dulles

To: Welfare Reform Working Group
From: Jeremy Ben-Ami
Date: October 5, 1993

Attached for your review on your way to California is a preliminary draft set-of-briefing-materials for the California visit. The final briefing book will be waiting for you at the front desk of the Fairmont Hotel. The only major missing pieces are the final schedule and the bios and profiles of witnesses and panelists.

Thursday Morning

Please note that we begin the day on Thursday with a breakfast meeting at 8 a.m. with county elected and administrative officials in the State room of the Fairmont Hotel. You will be getting a quick 15 minute briefing followed by the actual breakfast meeting.

Checkout/Baggage -- Please check out before breakfast and bring your bags to the State room. We will be leaving directly from breakfast and not returning to the hotel.

Dress Code -- While the day starts with the breakfast meeting, the majority of the day will be spent in meetings and focus groups with AFDC participants in county GAIN offices. You should decide for yourself whether you would prefer to be dressed informally.

If you have any questions on arrival, please contact me or Jim Hickman. Have a good trip.

DRAFT

**WELFARE REFORM
WORKING GROUP**

**Regional Visit
Briefing Book**

**California
October 7-8, 1993**

Regional Visit Overview

Welcome to California. This is the third in a series of regional visits by the Welfare Reform Working Group planned to provide members with opportunities to meet, talk to, and learn from people receiving assistance from the welfare system and from programs that help them move from welfare to work. The focus of this visit is examining lessons from the California GAIN program for the national welfare reform effort. The two day visit will include site visits to county GAIN programs, focus groups with clients and staff, private meetings with State and county officials, a public forum and media opportunities. The schedule for the visit has been designed to maximize the opportunities for contact and discussion with "real people," and to fulfill the Group's pledge to conduct an open and collaborative process.

This briefing book will provide you with background information on California welfare policy, the programs which we will be visiting and the people who will be participating in the forum.

basic information on the various components of the visit and on the people and programs from which you will be hearing. If you need anything on arrival, or have any questions at any time, please feel free to contact Jim Hickman.

We are very interested in getting your reactions and feedback to the visit to help us in planning subsequent trips. We would very much appreciate your taking the time to fill out the feedback form at the back of this book and return it to the Working Group staff (fax #202-401-4678).

Logistical Information

The following are some logistical details you will need to know to ensure an easy and orderly visit in California.

Hotel Arrangements/Check Out/Baggage

You will be staying Wednesday night at the Fairmont Hotel in San Francisco and Thursday night at the Sacramento Hilton.

- On Thursday morning, please check out prior to the 8:00 breakfast meeting and bring your bags with you to the State Room. We will load them onto the vans and ensure that they arrive in Sacramento with you.
- On Friday morning, please check out and be at the vans with your bags by 7:30 in front of the hotel. Please indicate at that time whether you will be leaving from Sacramento or returning to San Francisco. Your bags will be stored during the hearing and will be with you again on departure.

If you are spending Friday night at the Fairmont again, please ensure that your reservation is confirmed before you leave on Thursday morning.

Meals & Incidentals

Working Group members will be provided with most of their meals during the California trip:

- o Thursday breakfast at 8:00 at the Fairmont Hotel State Room will begin with a short briefing and an 8:15 meeting with county elected and appointed officials
- o Thursday lunch in Alameda County with GAIN staff and participants
- o Friday breakfast at Sacramento City College auditorium, room A-9 with state elected officials
- o Friday lunch in the holding room with witnesses from the morning session

Dinner Thursday is not scheduled, and Working Group members will be on their own in Sacramento.

Hotel charges are the responsibility of the individual Working Group member and all billing should be processed by the individual's travel agency and/or department.

Transportation

Working Group members should catch a Supershuttle from San Francisco airport to the Fairmont. Transportation will be provided throughout the remainder of the trip. On Friday after the hearing, you will have the choice of either returning to San Francisco, where we will drop some people at the airport and the remainder at the Fairmont or going to the Sacramento airport.

Details regarding transportation such as departure times and locations appear on the daily schedules included in this briefing book.

Suggested Dress Code for Site Visits

Please note that on Thursday we will be visiting a number of GAIN offices and meeting informally with participants. You may not wish to be formally dressed for these visits. However, you will also be having breakfast with county elected officials and some county human service officials. We leave this to your best judgment.

California State Profile

This section of the briefing book provides background information related to the State of California and its welfare reform efforts. This section contains two pages of charts and tables providing basic statistical data about AFDC, poverty and child support in California as well as a short overview of welfare reform initiatives in the State. Section three of the briefing contains a copy of an April 1993 press release by the Manpower Research Demonstration Corporation (MDRC) summarizing their latest evaluation of the GAIN program. Section four contains material related to immigration and entitlement programs. Finally, section five provides a summary of press coverage of the issue in some of the leading media outlets in the state.

California

DEMOGRAPHICS	State	U.S. (*)	Rank
Population (7/1/92)	30,867,000	255.1m (T)	1
Child Population (4/1/90)	7,810,000	63.9m (T)	1
Percent of Population that are children (7/1/92)	26.2%	25.7% (A)	24
Per Capita Personal Income-FY 89	19,740	17,567 (A)	8
Poverty Rate			
1991	15.7%	13.7% (A)	13
1989	12.9%	12.7% (A)	19
1983	14.9%	15.4% (A)	29
1979	11.4%	12.4% (A)	27
Change in Rate (1979-1991)	+4.3%	+1.3% (A)	

Aid to Families with Dependent Children

AFDC - Benefits	State	U.S. (*)
Total assistance payments-FY 92	5828.3m	22,223.5m (T)
AFDC Grant-Jan 93 (Mother-two children-0 income)	624	367 (M)
Food Stamp benefit-Jan 93	202	285 (M)
Combined benefits-Jan 93	826	652 (M)
Percent of poverty threshold-Jan 93	89%	70% (M)
Percent change in AFDC benefit levels since 1980	-17.8%	-22.4% (A)

AFDC - Caseloads	State	U.S. (*)
Average Monthly AFDC Caseload (people)-FY 92	806,100	4,768,600 (T)
AFDC Reciprocity Rate-FY 92	7.5%	5.3% (A)
Change in AFDC Reciprocity-FY 88-92	+23%	+20% (A)
Average Payment per Family-FY 92	603	388 (A)
Average Number in AFDC Unit (10/90-9/91)	2.9	2.9 (A)
Food Stamp Reciprocity FY 92	8.29%	9.95% (A)

<u>AFDC -- Income Data</u>	<u>State</u>	<u>U.S. (*)</u>
Percent of Families with Unemployed Parent-9/92	13.4%	5.7% (A)
Percent with Earned Income-10/90-9/91	8.7%	7.9% (A)
Percent Receiving Public Housing/ HUD Rent Subsidy-10/90-9/91	7.7%	21.0% (A)
Number of Persons JOBS Money Obligated- FY 91	60,046	460,914 (T)

Child Support Enforcement

<u>Collections and Expenditures</u>	<u>State</u>	<u>U.S. (*)</u>
Total Collections-FY 92	653.7m	7,951.1m (T)
AFDC Collections-FY 92	314.2m	2,252.6m (T)
Child Support Collections per \$ of Total Admin. Expend.-FY 92	2.59	3.99 (A)
Average Number AFDC Cases in which a Collection was Made-FY 92	116,118	830,713 (T)
Percentage Change in Total Real Collections since 1983	+64%	+34% (T)
Total Number of Paternities Established-FY 92	65,062	515,393 (T)
Number of out-of-wedlock births-1990	193,559	1,165,384 (T)

*Type: A=average, M=median, T=total

Source: 1993 Green Book

State Welfare Policy

The State of California's experience with welfare reform over the past decade provides important information and lessons for the national reform effort. While California's experience is important for the Working Group to study, Californians are eager to drive home the impact that national reforms could have on the people and budget of California. The nation's largest state has a disproportionate share of the country's welfare cases and expenditures. It has the fourth largest maximum AFDC grant in the continental United States, following only Connecticut, Vermont and Suffolk County, NY. In fiscal year 1992, California accounted for 12 percent of all Federal JOBS money. It has by far the highest average monthly caseload and total assistance payments, which totalled over \$5.8 billion for fiscal year 1992. Additionally, the State has the second highest AFDC reciprocity rate, behind only the District of Columbia, and an unofficial GAIN participation rate of about 13.2 percent.

The centerpiece of California's welfare policy is the Greater Avenues for Independence (GAIN) program, begun in 1986, which was a model for the Federal JOBS program and now serves as the State's implementation of the federal legislation. Further major changes to the AFDC program in California have been at the center of legal and political battles over the past two years. These policy changes are described in greater detail below and will be the focus of the Working Group's visit over its two days in California.

The Manpower Research and Demonstration Corporation has studied the GAIN program closely, and its two reports, the First Year Report from May 1992 and the follow up from April 1993, are the basis for much of this briefing material. A number of the major issues that MDRC has highlighted will be explored in detail during the morning roundtable at Friday's forum. A summary of the most recent MDRC report on GAIN can be found in section three.

1. LEGISLATION

GAIN (Greater Avenues for Independence)

The GAIN program is now functioning statewide in all 58 counties. Most single parents on welfare with no children under the age of three are required to participate in the program. Heads of two-parent families on welfare are also required to participate. Recipients who have a high school diploma and pass a basic reading and math test start with activities that help them look for jobs. Those who do not have a high school diploma, do not pass the test, or are not proficient in English are considered, according to GAIN's criteria, to need further education. They can choose to look for work first but must attend adult education classes if they do not find a job within a few weeks. GAIN pays for child care and transportation for participants. Transitional child care is also available for a year after participants find jobs and get off welfare.

California has provided each county considerable flexibility in shaping its version of GAIN. As MDRC reports, this has provided the opportunities for a variety of welfare reform strategies to be tried within the state. Some counties focus more heavily on education as a route to better jobs, while others stress efforts to find a job quickly. We will be examining these differences in approach in the site visits on Thursday and in the roundtable Friday morning.

The recent reforms under Governor Wilson expanded the GAIN program dramatically, increasing State funding by \$41 million, allowing California to collect an additional \$39.4 million in Federal JOBS funding. This funding increase will allow over 47,000 more AFDC recipients to be served. According to HHS and California state information, 33,991 people met federal JOBS participation requirements in 1992. A total of 61,000 people participated in GAIN but did not meet the 20 hour participation requirements.

1992 Welfare Reform Legislation

Governor Wilson's Welfare Reform Program of 1992 proposed the following AFDC changes:

- * Reduce the monthly AFDC assistance payment by 10 percent to all families.
- * Limit AFDC benefits for 12 months to new families to the level of the former State of residence or the current California level, whichever is lower.
- * Cap benefit levels to exclude children conceived while their mother or father was receiving aid.

- * Reduce the monthly AFDC assistance payment by 15 percent for families headed by non-disabled adults after an initial 6-month transitional period.
- * Apply the \$30 plus one-third earned income disregard indefinitely.
- * Extend AFDC-UP eligibility to two-parent families when the principal earner works 100 hours or more per month.
- * Provide a \$50 per month incentive payment or \$50 per month grant reduction based on school attendance of pregnant or parenting teens on AFDC (Cal Learn).
- * Exercise the federal option to require minor parents to live with their parents (with some exceptions), although a federal waiver is not required for such action.

These reforms, although approved by HHS on July 14, 1992, have not all been implemented. The Governor attempted to move the program through the State legislature in April 1992 and failed. He did, however, get enough votes to put the package on the ballot for a referendum vote in November 1992. Prior to November, the residency requirement, the "work incentive" provisions and a smaller AFDC grant cut of 5.8 percent passed as part of the State budget resolution. The referendum in November on the rest of the package failed. The implementation of the provisions passed by the legislature is discussed below.

2. DEMONSTRATION PROGRAMS/FEDERAL WAIVERS

California Assistance Payments Demonstration Project

This project, approved by HHS on October 29, 1992, implements the Wilson provisions passed in the budget resolution bill. The program: 1) reduces AFDC grants by an additional 1.3 percent over the 4.5 percent cut of Oct. 1, 1992; 2) eliminates the requirement that the "principal earner" parent work less than 100 hours a month to be eligible for AFDC-UP; 3) eliminates the Federal time limits on the \$30 plus one-third earnings disregard; and 4) limits AFDC benefits for new residents to the amount that they received in their previous state of residence (if lower) for the first 12 months of their residence in California. Implementation of the state residency provision has been delayed by a lawsuit, Green v. Anderson which challenges the constitutionality of the provision (see below).

California Automated Fingerprint Image Reporting and Match System (AFIRM)

This demonstration application requested Federal approval and funding to expand the existing LA County General Relief "Automated Fingerprint Image Reporting and Match" project to include the county's AFDC population. Under the demonstration, compliance with fingerprinting is an eligibility condition for AFDC. The HHS approval letter states that "failure to cooperate with fingerprint requirements by an aided adult or an aided minor parent will result in ineligibility for that individual," and that a nonaided payee's failure to cooperate may result in an investigation of fraud. Mandatory fingerprint participants are all aided adults, including minor parents, and nonaided payees. The program was approved by HHS January 8, 1993, and will last 3 years.

3. RELATED LITIGATION:

Green v. Anderson: This class action challenges the provision of the Wilson program that limits the benefits for new residents of the State. Plaintiffs claim the policy violates the Equal Protection and the Privileges and Immunities clauses of the US Constitution, and the constitutionally guaranteed right to travel. A preliminary injunction, still in effect, was granted on January 28, 1993. In granting the injunction, the Court found that the policy penalizes new residents and that a clear line of Supreme Court cases barring such disparate treatment unless a compelling State interest is shown. No compelling State interest was found here: the express desire to deter migration is a constitutionally impermissible purpose, and the desire to save State funds was not found to justify this particular classification.

The Court noted that the payment of benefits at the level that would have been provided in the previous State did not reflect higher housing costs in California. Plaintiffs include persons who were victims of abuse and who were returning to or joining family members. A final determination in the case has not been made.

Beno v. Shalala: In Beno, plaintiffs challenged the 1992 HHS approval of California's waivers reducing AFDC benefits by an additional 1.3 percent. The plaintiffs challenged the waiver on substantive and procedural grounds and sought a preliminary injunction against its implementation. The Court, however, ruling on July 1, 1993, denied the preliminary injunction.

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**CALIFORNIA'S AMBITIOUS WELFARE-TO-WORK PROGRAM
SHOWS CONTINUED EFFECTIVENESS**

California's statewide program to move welfare recipients into work through job search assistance, education, and training is having effects that are growing stronger over time, according to a new study. The state's Greater Avenues for Independence (GAIN) Program saw its encouraging first-year effects on the earnings of single parents on welfare nearly double in the second year of the study, and its effects on yearly welfare savings increase by one-fifth. In one county, GAIN's impacts were the largest ever found in a program of this type.

The results are broadly relevant because California has about one-sixth of the nation's welfare recipients and GAIN, which started in 1986, is one of the largest and most ambitious programs operating under the approach adopted by Congress in its 1988 national welfare reform legislation. It is one of the first programs in the country to place a heavy upfront emphasis on improving welfare recipients' basic literacy skills, as encouraged under that national initiative. The federal law, known as the Family Support Act, created the Job Opportunities and Basic Skills Training (JOBS) Program, which provides up to \$1 billion per year in funding for GAIN and other states' welfare-to-work initiatives. GAIN accounts for 12 percent (in fiscal year 1992) of the federal government's total spending on JOBS.

The findings from GAIN, which are based on the experiences of 33,000 welfare recipients in the six research counties (where half the state's welfare population live), come at a time when the national debate over welfare reform is intensifying and there is little other information available on the effectiveness of large-scale JOBS programs. They are contained in a report released today by the Manpower Demonstration Research Corporation (MDRC), a nonprofit,

nonpartisan organization that is conducting an evaluation of GAIN under a contract with the California State Department of Social Services.

Commenting on the findings, Dr. Judith M. Gueron, President of MDRC, said: "The impressive results from California suggest that programs like GAIN can make an important contribution to the overall effectiveness of welfare reform efforts. With resources and commitment, states that want to combine opportunities and real participation obligations can change the basic character of welfare and both increase employment and reduce the welfare rolls." "At the same time," Dr. Gueron cautioned, "the results do not lead us to expect that GAIN or other JOBS programs will by themselves move large numbers of people out of poverty. Meeting that goal may require a mix of strategies, such as combining JOBS with other policy changes that increase the incentive for welfare recipients to go to work."

Two-Year Findings

The program's strongest effects were for welfare recipients who were single parents (mostly mothers) with school-age children. After a two-year follow-up period, the study compared the earnings of people who were on welfare and who were required to participate in GAIN with the earnings of a control group of similar people who were not in GAIN. In the second year, the program group earned 24 percent more than the control group. This amounts to an increase of \$519 per person when averaged over the entire program group (including those who did not work). "This does not mean that everyone saw their earnings rise by \$519," explained Dr. Gueron. "Some people benefited a lot more, while others had no earnings gain at all." Overall, this second-year effect is almost twice the size of the \$266 average effect observed in the first year. (The attached Tables 1 and 2 summarize the overall six-county results for single parents and heads of two-parent families, respectively.)

GAIN also succeeded in reducing the amount of welfare received by the program group. During the second year, these payments were \$347 (or 7 percent) lower per person than the average amount received by the control group. This reduction represents a more than 20 percent improvement over the amount of welfare savings that GAIN achieved in the first year.

GAIN also produced positive effects for welfare recipients who headed two-parent families (primarily men). In the second year, the average earnings of this group increased by \$370, or 12 percent over the control group's average, and welfare payments were reduced by \$469, or 7

percent. However, in contrast to the upward trend in the results for the single parents, these program effects were roughly equivalent to those detected in the first year.

County Variation

GAIN's two-year effects varied across the six study counties. (The county-specific results are presented in Table 3 for single parents and Table 4 for heads of two-parent families.)

Riverside, a large county in southern California, continued to have the most impressive results for single parents. In the second year, it raised the program group's earnings by \$1,179, or 53 percent over the control group average. When added to its first-year results, the total improvement in earnings reached \$2,099 per person. Riverside also saved \$701 in welfare payments in the second year, a 17 percent reduction compared to the amount of payments made to the control group. Total welfare savings climbed to \$1,397 per person after two years. These earnings and welfare impacts were the largest in any of the six counties, and are larger than those found after just two years in previous large-scale welfare-to-work programs.

Alameda, Butte, Los Angeles, and San Diego also produced modest-to-large earnings increases or welfare savings for single parents, although not always both and not as consistently across different types of people in this group. However, for some recipients, these effects were almost as large as in Riverside. One county, Tulare, produced almost no significant earnings gains or welfare savings over the two-year period.

Although the results varied, the authors were encouraged that five of the six counties showed substantial and growing effects, including, in some counties, effects on long-term recipients, who account for the bulk of welfare spending over time. The counties operated their programs with different approaches, types of welfare recipients, and labor market conditions. "If the JOBS program is to have a broad payoff, it will have to work in many different contexts and with a variety of strategies," said Dr. James Riccio, who is directing the GAIN study. "At the same time, some approaches may work better than others. The challenge is to identify the best ones and adapt them to new settings."

Assessing the Results

The report offers a tentative explanation for the very strong results in Riverside County. Like other counties, Riverside provided substantial education and training services in addition to job search activities. However, it combined these activities with a strong message encouraging

participants to progress quickly toward looking for a job and not be particularly selective about the kinds of jobs and wage levels they would accept. In addition, the program had a strong job development component through which the staff tried to help participants locate employers with job openings. The staff also emphasized and enforced the obligation of enrollees to participate regularly in GAIN or face a reduction in their welfare grants. Further, the county served all recipients who were required to participate, not just those who were more employable from the start. While Riverside was not unique on all of these dimensions, this particular combination of factors was not found to the same degree in any of the other counties. Finally, even with a relatively high unemployment rate, Riverside enjoyed comparatively high economic growth, as indicated by some measures, which might also have contributed to GAIN's performance there.

Tulare, a rural county in California's large Central Valley, showed few impacts on earnings or welfare for single parents or heads of two-parent families. The county's agriculture-based labor market, its high unemployment rate (over 14 percent during the study period), plus the severe economic after-effects of a crop-destroying winter freeze that struck during the follow-up period may partly account for these results. The Tulare findings show that, despite GAIN's overall positive effects, it might not work everywhere, at least in the relatively short term.

The report points out that a complete assessment of the program's effectiveness must await further follow-up, especially in light of GAIN's heavy emphasis on education and training. If investing in these activities has a payoff, the full amount might not be realized for a number of years. Therefore, the report cautions against drawing final conclusions on which ways of operating GAIN will be the most effective in the long run.

Future MDRC reports on GAIN will present longer-term results, and will address a variety of other questions that could not be answered in this report. The results of a cost-benefit analysis will be particularly important, for they will determine whether the welfare savings and other benefits produced by GAIN outweighed the program's costs and whether the total income of the program group increased.

Welfare as a Two-Way "Bargain"

The Family Support Act of 1988 redefined Aid to Families with Dependent Children (AFDC), the nation's largest cash welfare program, as a two-way "bargain" rather than a traditional one-way entitlement program. Thus, in exchange for their benefits, welfare recipients can be expected to participate in programs that help them look for jobs or get education and

training that prepares them for work. To bring about this shift, the Act created the JOBS program to expand funding for state welfare-to-work programs.

While such programs have expanded substantially since 1988, only about 66 percent of the federal money available for JOBS was spent in fiscal year 1992; states must first put up their own money in order to access funding from Washington. Faced with rapidly rising welfare caseloads and severe budgetary pressures, state policymakers have confronted difficult choices. In this context, the evidence of welfare savings in GAIN is encouraging. However, as noted above, an analysis that compares these savings with GAIN's costs is not yet available.

How Does GAIN Work?

GAIN is administered by California's 58 counties under the direction of the State Department of Social Services. During the period covered by the MDRC study, depending on funding availability, GAIN rules required most single parents on welfare (typically mothers) with no preschool-age children to participate in the program for as long as they stayed on welfare. Virtually all heads of two-parent welfare families were also required to participate. Recipients who have a high school diploma and pass a basic reading and math test start with activities that help them look for jobs. Those who do not have a high school diploma, do not pass the test, or are not proficient in English are considered, according to GAIN's criteria, to need further education. These people can choose to look for work first, but they must attend adult education classes if they do not find a job within a few weeks. GAIN pays for child care and transportation while people are in the program. Transitional child care is also available for a year after they find jobs and get off welfare.

Although the program operates under the same general rules all over the state, each county has considerable flexibility to shape its own version of GAIN. Thus, MDRC found that in some counties the program focused more heavily on education as a route to better jobs, while in others it stressed efforts to find a job quickly. However, even in counties with a stronger emphasis on quick employment, the number of recipients participating in education and training was still larger than in previous programs. Other important differences among counties include the extent to which GAIN staff used the threat of welfare grant reductions to enforce the program's participation rules and the level of personalized attention GAIN staff provided to clients.

Testing GAIN

The new report, entitled *GAIN: Two-Year Impacts in Six Counties*, is the sixth produced by MDRC since the GAIN evaluation began in 1986. The authors are Daniel Friedlander, James Riccio, and Stephen Freedman. The six diverse counties covered in the report are: Los Angeles, which has more welfare recipients than many entire states; San Diego, which has the state's second-largest AFDC caseload; Alameda, which includes the City of Oakland; Riverside, a large county east of Los Angeles, with both urban and rural areas; Butte, a small county in northern California; and Tulare, a rural county in California's Central Valley.

To find out whether GAIN helps recipients find jobs and leave welfare, eligible recipients in the study counties were assigned, at random, to one of two groups. About three-fourths went to the program group and were required to participate in GAIN according to the normal rules. The remaining one-fourth went to the control group and did not participate in GAIN. By comparing how members of the two groups fare in the labor market and how much welfare they receive over several months or years, the study is able to isolate any changes produced by GAIN. This type of study has been used to evaluate similar social programs in the past, and is considered to be highly reliable.

Reasons for Caution in Drawing Lessons for JOBS

Although the GAIN results offer a helpful preview of the possible outcomes of JOBS programs, it is important to note that GAIN and California are atypical in several important respects. First, the GAIN model differs from the approaches being used in many other state JOBS programs. Second, California's welfare grant levels are among the highest in the country. Third, because California did not require recipients with preschool-age children to participate in GAIN when the evaluation started, the new study does not say anything about how programs may affect this important group, which is now required to participate under JOBS rules (and will be included in later GAIN reports). Finally, although comparisons among the GAIN study counties will provide useful information about the relative strengths of different strategies for running JOBS, it will not be possible to draw firm conclusions because the counties themselves differ in so many other ways. The JOBS evaluation, which MDRC is now conducting for the U.S. Department of Health and Human Services, will make this kind of comparison directly by testing two different JOBS models in one location at the same time.

TABLE 1

GAIN's FIRST- AND SECOND-YEAR IMPACTS ON EARNINGS AND AFDC PAYMENTS
FOR AFDC-FGs (SINGLE PARENTS)

(ALL COUNTIES COMBINED) (a)

Outcome	Program Group Average (\$)	Control Group Average (\$)	Difference (\$)	Percentage Change
Earnings				
Year 1	1908	1642	266 ***	16%
Year 2	2712	2193	519 ***	24%
Total	4620	3835	785 ***	21%
AFDC Payments				
Year 1	5964	6247	-283 ***	-5%
Year 2	4670	5017	-347 ***	-7%
Total	10634	11264	-630 ***	-6%

NOTES: The average second-year earnings per experimental who worked at any time during the second-year period were \$6696 for single parents.

*** Denotes statistical significance at the 1 percent level.

(a) Each impact estimate is the average of the impacts for each county, which were weighted equally.

The Manpower Demonstration Research Corporation

Founded in 1974 by the Ford Foundation and a consortium of federal agencies, MDRC designs and studies programs intended to improve the prospects of disadvantaged people. During the past 19 years, the organization has field-tested a wide variety of programs for welfare recipients, teenage parents, high school dropouts, and other groups. The organization has offices in New York and San Francisco.

TABLE 2

GAIN'S FIRST- AND SECOND-YEAR IMPACTS ON EARNINGS AND AFDC PAYMENTS
FOR AFDC-US (HEADS OF TWO-PARENT FAMILIES)

(ALL COUNTIES COMBINED) (a)

Outcome	Program Group Average (\$)	Control Group Average (\$)	Difference (\$)	Percentage Change
Earnings				
Year 1	2903	2519	384 ***	15%
Year 2	3539	3168	370 **	12%
Total	6442	5687	755 ***	13%
AFDC Payments				
Year 1	7029	7451	-422 ***	-6%
Year 2	5871	6340	-469 ***	-7%
Total	12900	13791	-891 ***	-7%

NOTES: The average second-year earnings per experimental who worked at any time during the second-year period were \$7358 for the heads of two-parent families.

*** Denotes statistical significance at the 1 percent level; ** denotes statistical significance at the 5 percent level.

(a) Each impact estimate is the average of the impacts for each county, which were weighted equally, but excluding Alameda County because of its small sample sizes for AFDC-US.

TABLE 3

SUMMARY OF GAIN'S FIRST- AND SECOND-YEAR IMPACTS ON EARNINGS AND AFDC PAYMENTS
FOR AFDC-FG (SINGLE PARENTS)

County	Average Total Earnings				Average Total AFDC Payments			
	Program Group (\$)	Control Group (\$)	Difference (\$)	Percentage Change	Program Group (\$)	Control Group (\$)	Difference (\$)	Percentage Change
Alameda								
Year 1	1421	1212	209	17%	6916	7086	-150	-2%
Year 2	2132	1609	524 *	33%	5816	6076	-260	-4%
Total	3553	2821	733 *	26%	12732	13142	-411	-3%
Butte								
Year 1	2001	1729	272	16%	5132	5486	-353 *	-6%
Year 2	2996	2442	554	23%	3715	4048	-333	-8%
Total	4997	4171	826	20%	8848	9534	-686 *	-7%
Los Angeles								
Year 1	1304	1308	-4	-0%	6875	7203	-328 ***	-5%
Year 2	1694	1582	112	7%	3711	6112	-401 ***	-7%
Total	2998	2890	108	4%	12586	13315	-729 ***	-5%
Riverside								
Year 1	2470	1550	920 ***	59%	4968	5663	-695 ***	-12%
Year 2	3414	2234	1179 ***	53%	3461	4162	-701 ***	-17%
Total	5883	3784	2099 ***	55%	8429	9825	-1397 ***	-14%
San Diego								
Year 1	2462	2113	349 **	17%	5529	5832	-302 ***	-5%
Year 2	3503	2794	709 ***	25%	1199	4879	-480 ***	-10%
Total	5965	4906	1058 ***	22%	9728	10511	-783 ***	-7%
Tulare								
Year 1	1792	1941	-149	-8%	8363	6231	132	2%
Year 2	2532	2498	34	1%	5120	5027	94	2%
Total	4324	4439	-115	-3%	11484	11258	226	2%
All counties (a)								
Year 1	1908	1642	266 ***	16%	5964	6247	-283 ***	-5%
Year 2	2712	2193	519 ***	24%	4670	5017	-347 ***	-7%
Total	4620	3835	785 ***	21%	10634	11264	-630 ***	-6%

NOTES: Dollar averages for each year include zero values for sample members who were not employed or did not receive welfare during that year.

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

(a) This estimate is the average of the impacts for each county, which were equally weighted.

TABLE 4

SUMMARY OF GAIN'S FIRST- AND SECOND-YEAR IMPACTS ON EARNINGS AND AFDC PAYMENTS
FOR AFDC-U (HEADS OF TWO-PARENT FAMILIES)

County	Average Total Earnings				Average Total AFDC Payments			
	Program Group (\$)	Control Group (\$)	Difference (\$)	Percentage Change	Program Group (\$)	Control Group (\$)	Difference (\$)	Percentage Change
Alameda (a)								
Year 1	..	..	..	..	..	..	..	..
Year 2	..	..	..	..	..	..	..	..
Total	..	..	..	..	..	..	..	..
Butte								
Year 1	3026	2393	633 *	26%	6523	6749	-226	-3%
Year 2	4018	2773	1244 ***	45%	5246	5775	-529	-9%
Total	7044	5166	1877 **	36%	11769	12524	-755	-6%
Los Angeles								
Year 1	1480	1221	259 **	21%	9442	9871	-429 ***	-4%
Year 2	1785	1465	320 *	22%	8333	8826	-493 ***	-6%
Total	3266	2687	579 **	22%	17775	18697	-922 ***	-5%
Riverside								
Year 1	3691	2930	761 ***	26%	4845	5810	-965 ***	-17%
Year 2	4039	3626	413	11%	3895	4643	-749 ***	-16%
Total	7730	6556	1174 **	18%	8739	10453	-1714 ***	-16%
San Diego								
Year 1	3331	3089	242	8%	6790	7301	-510 ***	-7%
Year 2	4128	3978	150	4%	5565	6197	-632 ***	-10%
Total	7459	7067	392	6%	12356	13498	-1142 ***	-8%
Tulare								
Year 1	2987	2961	26	1%	7545	7523	23	0%
Year 2	3723	3998	-275	-7%	6316	6261	54	1%
Total	6709	6959	-249	-4%	13861	13784	77	1%
All counties (b)								
Year 1	2903	2519	384 ***	15%	7029	7451	-422 ***	-6%
Year 2	3539	3168	370 **	12%	5671	6340	-469 ***	-7%
Total	6442	5687	755 ***	13%	12900	13791	-891 ***	-7%

NOTES: Dollar averages for each year include zero values for sample members who were not employed or did not receive welfare during that year.

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

(a) Because of Alameda's small sample size for AFDC-U's, the estimates of its earnings impact (\$200, or an 18 percent increase over the control group average) and AFDC payments impact (\$180, or a 2 percent increase) are considered much less reliable than those for the other counties; therefore, the Alameda impacts are not included in this table.

(b) This estimate is the average of the impacts for each county (except Alameda), which were equally weighted.

ALIEN ELIGIBILITY FOR HHS ENTITLEMENT PROGRAMS

ISSUE: Should the Department have a uniform policy on the eligibility of aliens for benefits from our various entitlement programs? Can such a uniform policy be developed?

BACKGROUND: The treatment of aliens under HHS' entitlement programs has tended to evolve in an ad hoc manner and has consequently become somewhat complicated. This is due to a number of factors, including—

- ▶ The complexity of immigration law and the number of different immigration statuses;
- ▶ The lack of uniform definitions and treatment of aliens in the Social Security Act that would apply to all of our major entitlement programs;
- ▶ The differences in the goals, purposes, and structures of the entitlement programs themselves which can lead to different eligibility standards for aliens (e.g., providing emergency medical services, but not welfare support payments, to illegal aliens); and
- ▶ Changing political and economic realities that may affect perceptions about social/health policy directed towards aliens (e.g., the congruence between California's recent recession and state budget problems and public concern over the costs associated with illegal aliens—such as emergency medical services).

It is useful to establish some basic definitions of terms. The word "alien" is a technical, legal term for a person who is not a U.S. citizen. There are "legal" and "illegal" aliens. In general, a legal alien is an individual who is not a U.S. citizen but has been provided by the INS a document that authorizes his/her presence in the U.S., and the document has not expired. A legal alien must be in possession of such document at all times. There are permanent and temporary legal aliens. Temporary legal aliens include groups such as students and tourists that receive non-immigrant visas and are not eligible for entitlement benefits. For purposes of understanding alien eligibility for entitlements, permanent legal aliens comprise basically two groups—

- ▶ Lawful permanent resident aliens, or "regular immigrants" (those possessing valid "green cards"). In order to be granted regular immigrant status, a U.S. citizen must submit a petition to the INS on behalf of the immigrant. The petition is a request that a foreign individual be granted regular immigrant status. Such petitions can be submitted by either relatives or employers.

If a relative submits the petition, he/she agrees to become that immigrant's sponsor for purposes of AFDC and SSI eligibility (i.e., agrees to have his/her income and resources deemed as available to the immigrant for purposes of determining program eligibility). An employer-submitted petition does not impose a similar sponsorship requirement on the employer.

- Aliens "permanently residing in the U.S. under color of law" (PRUCOL). A PRUCOL individual is defined generally as an alien who is residing in the U.S. with the knowledge and permission of the INS, and whose departure the INS does not contemplate enforcing. While this is *not* a formal status *per se* granted by the INS, it is a term used by four Federal benefit programs to determine alien eligibility for benefits (AFDC, SSI, Medicaid, and unemployment insurance).¹ This category of legal aliens covers a wide variety of statuses, such as refugee, asylee, parolee, conditional entrant, etc. Refugees represent the largest group of individuals under PRUCOL.

An illegal alien is an individual who is residing in the U.S., is not a U.S. citizen, and does not possess a valid INS document.

In general, subject to certain restrictions, permanent legal aliens are eligible for benefits under the major HHS entitlement programs (AFDC, SSI, Medicaid, Medicare, and social security insurance) if they meet program eligibility requirements. However, regular immigrants face more restrictions on entitlement eligibility than individuals that fall under PRUCOL. For the most part, PRUCOL aliens are eligible for entitlements on the same basis as citizens immediately upon arrival. Regular immigrants must have their sponsor's income and resources deemed as available to them for three years after entry for purposes of AFDC and SSI eligibility (see "Current Status" section below). This different treatment of refugees and immigrants under HHS entitlement programs can be viewed as a reflection of overall, post-World War II immigration policy.

In reviewing the history of immigration policy, the distinction between refugees and immigrants became firmly established during the period following World War II, and has continued until the present time. Defined broadly, refugees flee, generally in large groups, from political or religious persecution; immigrants come voluntarily, generally on an individual basis and in an orderly fashion. A third group, illegal or undocumented aliens, come outside the law, generally for economic reasons.

¹ The Food Stamp program does not make statutory reference to PRUCOL for eligibility purposes. Regulations governing the program specify precise categories of aliens eligible for Food Stamps, thus avoiding the vague "color of law" language.

The distinction between immigrants and refugees was unheard of during the mass migrations of the 19th century; no difference was perceived between the Irish fleeing the potato famine and the German "forty-eighters" fleeing political persecution. It developed in the wake of World War II, primarily as a means of reconciling our traditional ideal of asylum with restrictions in the immigration law that began to emerge in the 1920s. Since the 1940s, the goals and purposes of our immigration policy have diverged regarding admission of refugees and immigrants. In the case of refugees, humanitarian concerns and foreign policy considerations have been dominant, and admission of refugees has tended to be in reaction to events beyond the control of either the receiving society or the refugees themselves. On the other hand, domestic—as opposed to foreign—policy considerations have been paramount in the admission of immigrants.

Reforms in immigration law instituted since 1965 have expanded both the numbers and diversity of immigrants and refugees entering the U.S. Because of this, the percentage of the population that is foreign-born has grown sharply in the last 20 years, from an all-time low of 4.9 percent in 1970 to over 7 percent today. Congress' most recent overhaul of immigration law, the Immigration Act of 1990, allows for a substantial increase in immigration.²

CURRENT STATUS: The following is a summary of the restrictions on program eligibility that apply to permanent legal aliens under the Department's major entitlement programs.

- ▶ Each of our major entitlement programs (AFDC, SSI, Medicaid, Medicare, and social security insurance programs) are available to lawful permanent resident aliens who meet the program eligibility requirements, subject to the following conditions—
 - OASDI – Except for the following exceptions, OASDI extends to all individuals who are engaged in covered employment. An alien who has been deported is ineligible for benefits nor is a lump sum benefit payable on the alien's death, unless the alien has been readmitted as a permanent resident. Payments to an otherwise eligible alien who has been outside the United States for longer than 6 months may be terminated unless the alien qualifies under an exception to the nonpayment rule. Additionally, nonresident dependents and survivors cannot receive benefits for more than 6 months unless the relationship upon which the claim is based existed for

² For example, excluding immigrants who were legalized under the Immigration Reform and Control Act of 1986 (IRCA—see description below), there was an increase in total immigration from 612,000 in 1989 to 810,000 in 1992.

at least 5 years during which time the dependent or survivor lived in the U.S.

- o **AFDC and SSI** – a sponsored lawful permanent resident alien who applies for benefits is evaluated by having the sponsor's income and resources deemed available to the alien for three years from the alien's date of entry.
- o **Medicaid** – eligibility standards vary among states. However, states must provide Medicaid to all persons receiving cash assistance under AFDC, as well as to AFDC-related groups who do not actually receive cash assistance; SSI recipients; and pregnant women and infants with family incomes below the Federal Poverty Level.
- o **Medicare** – a lawful permanent resident alien must meet the age requirement and be eligible for Social Security or Railroad Retirement benefits, or eligibility for disability benefits under the Social Security or Railroad Retirement Acts for more than 24 consecutive months. Given these requirements, an alien generally must be a relatively long-term resident of the U.S. before becoming entitled to Medicare Part A.

Individuals over age 65 but otherwise ineligible for Medicare Part A benefits may purchase Part A benefits at cost. To be eligible to purchase Part A, the individual must be a U.S. resident, and either a U.S. citizen or an alien lawfully admitted for permanent residence who has resided in the U.S. for five consecutive years. Such individuals must also purchase Part B benefits for a monthly premium. Approximately 75% of the cost of basic Part B coverage is subsidized by general revenues, with enrollees paying the remaining 25% of costs.

- o The Immigration Reform and Control Act of 1986 (IRCA), which created a process whereby previously illegal aliens could become legal residents, prohibits such individuals from being eligible for Medicaid (with exceptions) and AFDC for five years from the date of their legalized status.
- PRUCOL individuals are eligible for entitlement benefits on the same basis as citizens. They do not face the same type of restrictions as sponsored lawful permanent residents due primarily to the fact that PRUCOL individuals are not required to have a sponsor whose income is deemed.³ For example, refugees—

³ Refugees are typically "sponsored" by various voluntary organizations or agencies, but are exempt from the deeming provisions applied to legal immigrants.

subject to meeting eligibility requirements—are eligible for AFDC, Medicaid, and/or SSI upon arrival.

- o In addition, refugees who do not qualify for assistance under our entitlement programs—due primarily to the fact that they do not fall into a category eligible for benefits, such as a single parent with dependent—may receive special medical and cash assistance through the discretionary Refugee Resettlement program. Eligible refugees must meet certain income and resource criteria to receive such assistance, similar to those under entitlement programs. Currently, discretionary appropriations for this program allow for 8 months of assistance.

Illegal aliens are not eligible for entitlement benefits, subject to the following two exceptions—

- An individual need not be a lawful resident to be eligible for Medicaid benefits for emergency medical services including labor and delivery services for pregnant women. All aliens who, except for their alien status, are qualified to receive Medicaid benefits may receive emergency care. The Federal government reimburses states for these benefits.
- An individual need not be a lawful resident to be eligible for benefits under the social security insurance programs. In general, benefits are provided to any individual who has contributed sufficiently to the program and otherwise meets program eligibility requirements. However, the ability of certain aliens to receive benefits is limited (see discussion in "OASDI" subsection above).

While the potential exists for illegal aliens to obtain benefits through fraudulent means, the states' experience with the Systematic Alien Verification for Entitlements (SAVE) program indicates that very few illegal aliens even apply for entitlement benefits. Whenever it is a condition of eligibility, including issuing a Social Security number, states routinely verify applicants' immigration documents and alien status.

DISCUSSION/OPTIONS: The coverage of aliens under the various HHS entitlement programs, and Federal policy towards aliens in general, has recently received increased attention by the Congress and media. Much of this attention has revolved around the treatment of illegal aliens under Medicaid and the policy regarding asylees. The issue of asylees gained prominence particularly in the wake of well-publicized smuggling of Chinese into the United States.

The Department has also considered a number of changes in the treatment of aliens under our entitlement programs. These changes are being considered in a variety of venues,

from health and welfare reform to the fiscal year 1995 budget and legislative process. The following discussion is organized around major policy areas that affect the treatment of aliens under our major entitlement programs. The discussion advances for consideration options to lend greater uniformity to Departmental policy with respect to aliens (e.g., proposals to make uniform in Social Security Act the definition of PRUCOL). At the same time, the discussion also indicates the difficulty of imposing complete uniformity on Departmental policy in some areas (e.g., the treatment of illegal aliens).

Illegal Aliens

The issue of providing emergency medical services to illegal aliens has surfaced recently in different forums. The President's Budget package included a provision to increase Federal payments by \$400 million to states disproportionately affected by the costs of providing emergency medical services to illegal aliens. States that would have received additional funding under this proposal were: California, Texas, New York, Illinois, Florida, Arizona, and Washington. This proposal was dropped in the final conference version of the reconciliation bill.⁴ A proposal by Senator Boren to discontinue Federal payments for emergency medical services provided to illegal aliens was also introduced within the FY 1994 Budget process. This proposal was estimated by the Congressional Budget Office to achieve Federal savings of \$400 million in FY 1995 (increasing to \$700 million by FY 1998 for a five-year total savings of \$2.2 billion). Boren's proposal was never approved by the Senate. More recently, an open letter by Governor Pete Wilson (R-CA) appeared in several newspapers calling for--among other things--eliminating the provision of emergency medical services to illegal aliens and denying citizenship to children born in the U.S. whose parents are illegal aliens.⁵

⁴ However, an amendment was included in the budget bill that disallows payment for organ transplant procedures under the Medicaid emergency medical services for aliens provisions.

⁵ Currently, any child born in the United States is a U.S. citizen, regardless of the alienage of the parent(s). While there are no Federal data on the number of children who attain citizenship in this manner, a survey--done by Westat for the INS--of legalized IRCA-alien parents show that roughly 45 percent of all aliens legalized under IRCA reported having children who were born in the United States. This represented an estimated 1 million citizen children born to approximately 1.6 million legalized aliens. These births occurred over a prolonged period of time (median period of entry was 1979). This represented a general fertility rate about the same as that for the total Hispanic population in the United States in 1987. The estimated U.S. rate for all Hispanics in 1987 was 93.0 births per 1,000

There are both public health and immigration policy issues involved in addressing the question of whether the Federal government should reimburse states for the provision of emergency medical services to illegal aliens. For example, Governor Wilson and other observers have approached the subject from primarily an immigration policy viewpoint, with seemingly little regard for public health aspects of the issue. They contend that the Federal government should be doing more to stem the flow of illegal immigration into the U.S., and that the policy of providing emergency medical services encourages rather than discourages illegal immigration. Such a view draws heavily on the perception that the majority of illegal aliens using such emergency medical services are pregnant women who cross the border to deliver their children in a U.S. hospital. While this perception may be valid in Southern California, it may not be valid in Washington. No Federal data are available on what types of illegal aliens are using these emergency services (i.e. pregnant women versus male construction workers), or on what types of services are used. While states may have better data on this, they are neither required nor have offered to submit such data to HCFA.⁶

The most rational interpretation of a policy that would deny emergency medical services to illegal aliens is that such a policy would form part of a larger, more effective strategy to stem overall illegal immigration. Precisely what constitutes such a larger strategy has not always been presented fully. Although recently Senator Feinstein (D-CA) has proposed charging a \$1 border-crossing fee with the resulting revenues used to support additional Border Patrol personnel, and Senator Boxer (D-CA) has called for using National Guard troops to patrol the US-Mexico border.

women 15 to 44 years of age. The INS has estimated the illegal alien population in the United States in 1992 at 3.2 million. Also, it has been estimated that in FY 1991, AFDC recipients who were the U.S.-born citizen children of aliens who themselves were ineligible for AFDC accounted for 3 percent of all AFDC cases in that year. However, the patterns and characteristics of IRCA-legalized aliens are not necessarily the characteristics of all illegal aliens, and thus generalizing the survey data to all illegal aliens has inherent problems. For example, most illegal aliens who legalized under IRCA were long-term residents of the United States, often called "settlers" in immigration literature. These people are more likely to exhibit higher rates of fertility than some other illegal aliens, such as short-term, work-based illegal aliens who may return to their country of origin. A further complicating factor is how one counts children who are the product of a union between a citizen and an illegal alien.

⁶ However, the survey of legalized IRCA-alien's referenced in footnote 5 yields some data that may be indicative of the use of medical services by illegal aliens. Only 10 percent of all legalized aliens were hospitalized in the 12 months before applying for legalization, and of these half--or 5 percent of the total--were for reasons of pregnancy. However, the limitation of generalizing this data to all illegal aliens applies here in the same manner as explained in footnote 5.

However, there are significant public health problems associated with a policy that would deny illegal aliens emergency medical services. For example, if illegal immigration was not consequently reduced, the result of not treating seriously-ill illegal immigrants could be large numbers of individuals dying on American streets due to denial of medical care. Not only would the ethical implications of such a policy be troublesome, but there would also be potentially adverse public health consequences associated with such a policy (i.e., the health of the general public could be adversely affected). Further, the Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA 85) requires hospitals that participate in Medicare to screen all those who present themselves to the emergency department to determine if there is an emergency, including women in active labor, and to treat such a patient to the best of their ability or transfer the patient to a more appropriate hospital. Any policy that required hospitals to certify the immigrant status of patients prior to providing them emergency care would be extremely difficult to implement. There would be a very real risk of falsely identifying an individual as an illegal alien (due to lack of identification, etc.), and it is extremely doubtful that hospitals would be able to effectively comply with both COBRA 85 requirements and a new policy that would deny emergency medical care to illegal aliens. These problems are likely to continue to exist even if upcoming health care reform provisions were to provide all citizens and legal aliens with some sort of universal "health card".

In sum, even if one is sympathetic to the policy goal of reducing illegal immigration, the negative effects on public health resulting from denying emergency medical services to illegal aliens, and the difficult implementation issues of such a policy, would seem to clearly outweigh any marginal contribution such a policy might have in reducing illegal immigration.

Definition of PRUCOL

There are many gray areas in trying to define which aliens fall under the definition of "permanently residing in the United States under color of law" (PRUCOL). Four Federal benefit programs—three of which are managed by HHS—use this term in defining alien eligibility (AFDC, SSI, Medicaid, and unemployment insurance). The PRUCOL category was first adopted for SSI in 1972; then for AFDC, by regulation in 1973 and by statute in 1981; for unemployment insurance in 1978; and for Medicaid, by regulation in 1982 and by statute in 1986. None of these statutes clearly defines the term PRUCOL, nor is the term defined in the Immigration and Nationality Act (the INA) or in INS' regulations. Consequently, specific regulations governing eligibility for each of these benefit programs have set distinct and separate guidelines for determining PRUCOL status and for defining this term. PRUCOL status has also been an issue that has been subject to, and defined by, various litigation.

Given the lack of a fixed meaning, only seven categories of aliens are universally accepted by Federal agencies as PRUCOL. These are refugees, asylees, conditional entrants, aliens paroled into the U.S., aliens granted suspension of deportation, Cuban-

Haitian entrants, and applicants for registry.

Other categories of aliens may or may not be eligible for public benefits, depending upon agency interpretation of the term PRUCOL and litigation that determines whether particular aliens or classes of aliens are eligible for benefits from particular programs. Such categories include aliens granted indefinite, extended, or renewable voluntary departure; aliens on whose behalf an immediate relative petition has been filed or approved; aliens who have filed for adjustment of status; aliens granted voluntary departure because they have a visa priority date within 60 days of being current; aliens granted a stay of deportation; aliens granted deferred action status; and aliens with pending applications for suspension of deportation or asylum.

The fact that there is no common definition of PRUCOL in the Social Security Act (the Act) that would apply to the AFDC, SSI, and Medicaid programs has led to different eligibility requirements for PRUCOL aliens for these programs. In general, AFDC has a more restrictive, or narrow definition of which aliens can qualify for benefits under PRUCOL, while SSI and Medicaid use a less restrictive definition. For example, AFDC statute and regulations define PRUCOL to include refugees, asylees, conditional entrants, and parolees. SSI regulations—on the other hand—define PRUCOL broadly to include some thirteen different alien statuses, including the "catch-all" category of aliens residing with INS knowledge and permission or whose departure the agency does not contemplate enforcing. SSI regulations have attempted to define this last category stating that the INS "does not contemplate enforcing your departure if it is the policy or practice of that agency not to enforce the departure of aliens in the same category or if from all the facts and circumstances in your case it appears that the [INS] is otherwise permitting you to reside in the United States indefinitely."

The lack of a common definition for PRUCOL in the Act has also spawned much litigation, which in turn has contributed to the different definitions of PRUCOL applied by the three programs. For example, in a 1977 case *Holley v. Lavine*, a Federal appeals court held that deportable aliens who resided in the U.S. with the continuing knowledge of the INS can qualify as PRUCOL for AFDC purposes. In this case, the INS had stated in writing that it would not deport an alien who had overstayed her visa, as long as her U.S. citizen children were financially dependent upon her. Under the facts in *Holley*, the possibility of future deportation did not prevent the alien from establishing that she was "permanently" residing in the U.S. *Holley* was the first major case to define the term "color of law" for public benefits eligibility.⁷

⁷ In this particular case, the citizenship of the children was based on their being born in the U.S. to the illegal woman. AFDC policy will provide benefits to eligible citizens. In such cases the eligible children can receive benefits but the ineligible mother cannot, thus leading to reduced benefits. The importance of this particular case was in beginning to define what it meant to "permanently reside" in the U.S. By virtue of the INS letter stating that it would not deport her--a rare

In another case, however, asylum applicants were found ineligible for AFDC benefits. A Federal court of appeals determined that although asylum applicants were residing "under color of law," their residence was temporary rather than permanent, because it was "solely dependent upon the possibility of having [their] application acted upon favorably." HHS subsequently promulgated a transmittal applying that decision on a national level. The court's holding, however, has been limited to eligibility for AFDC. For example, later courts have not relied on this reasoning when considering asylum applicants' eligibility for unemployment benefits.

The broader PRUCOL category used by the SSI program is substantially the result of litigation. In 1985 the parties in a Federal appeals court case, *Berger v. Secretary of HEW*, entered into a consent decree specifying certain categories of aliens who qualify as PRUCOL. The *Berger* case also included the category of "any other alien residing in the U.S. with the knowledge and permission of the INS and whose departure...the [INS] does not contemplate enforcing." SSI regulations were issued in 1987 implementing the *Berger* decision and specifying the multiple categories of aliens considered to be PRUCOL, as described above.

A difficulty with the current situation of using PRUCOL to determine benefit eligibility is that many of the immigration statuses that are included in PRUCOL are temporary statuses provided by INS. Thus, there are a number of individuals who have either entered illegally or overstayed their visa that end up being eligible for SSI benefits once INS becomes aware of their presence but does not immediately deport them. INS may allow the individual to remain temporarily in the U.S. for a number of reasons. For example, an illegal alien who has been identified by the INS may claim that s/he would be persecuted if returned to his/her home country and may be allowed to apply for asylum which would prevent deportation as long as the application was pending. Or the INS may allow an alien to remain temporarily in order to earn enough money to finance the return to his/her home country (if the INS deports an alien it must finance and ensure that the individual is returned safely to the country). Other cases may occur where the INS will provide an alien with temporary status if the alien can establish that s/he has an immediate relative who is either a citizen or a legal permanent resident of the U.S. and that deportation would be "inhumane" and "not in the public interest". A multitude of other scenarios are possible whereby an alien who has not arrived in the U.S. under permanent resident status is allowed to stay temporarily and thus falls under the category of PRUCOL for benefit eligibility.

There have been cases publicized where a previously "illegal alien" has been granted temporary status and thus has become eligible for--and receives--SSI benefits. In general, the publicity has portrayed the case as welfare benefits being provided to "illegal aliens",

circumstance since most illegal aliens do not obtain such a letter--the court determined that the mother fell under PRUCOL, thereby making her (as well as the children) eligible for benefits.

even though technically since INS has provided the individual with a temporary document--or status--then the individual is a "legal alien", and a PRUCOL alien for benefit eligibility purposes.

Refugees and asylees are the only two PRUCOL categories that are clearly recognized as leading to permanent resident status. Both refugees and asylees are eligible to adjust their immigrant status to legal permanent resident after 1 year of residing in the U.S. as a refugee or asylee.

Alien Deeming

For purposes of benefit eligibility for three Federal programs (AFDC, SSI, and food stamps), the income and resources of an alien's sponsor are "deemed" attributable to the alien for three years. This three-year period begins from the date the alien adjusts status or first enters the U.S. as a lawful permanent resident. A sponsor is a person who has signed an affidavit of support on behalf of an alien seeking permanent residence. The alien and sponsor are jointly and severally liable for any benefit overpayment. This provision prevents sponsored legal aliens from being eligible for entitlement benefits for three years, unless the sponsor's income and resources meet eligibility requirements and the legal alien also meets eligibility requirements. Deeming requirements do not apply to PRUCOL aliens. Also, there is no sponsor deeming requirement in Medicaid.

In general, deeming applies even if the sponsor is not actually supporting the alien. To receive benefits, a sponsored alien must provide information and documentation on the sponsor's income and resources, even if the sponsor refuses to cooperate. Income and resources of both the sponsor and the sponsor's spouse (if living with the sponsor) is deemed to the sponsored alien. An application for benefits may be denied if the required information is not reported to the agency.

For the AFDC program, the three-year deeming provisions may also apply to immigrants who were sponsored by a public or private agency or organization, unless the agency no longer exists or is no longer able to meet the alien's needs. Also for AFDC, if a sponsor is not actually supporting the sponsored alien, the sponsor's income and resources will not be counted when determining whether un-sponsored members of the alien's family--such as U.S. citizen children--are eligible for AFDC. There are no comparable provisions for SSI or food stamps.

For the SSI program, if the alien is the sponsor's child or spouse, the regular SSI parent-to-child or spouse-to-spouse deeming rules are applied instead of the three-year alien deeming rules. Also, deeming does not apply to aliens who become blind or disabled after admission to the U.S. as permanent residents.

Not all legal permanent resident aliens have a sponsor who signs an affidavit of support. For example, in 1992 a little over 20% of non-PRUCOL, permanent legal aliens were

issued visas based on an employer submitted petition. This type of petition signed by an employer does not designate the employer or any other individual as the alien's sponsor for the purpose of alien deeming rules. Also, some aliens may become eligible for immigration due to an individual petitioning INS, but may subsequently have a visa issued on a basis other than a signed affidavit of support (e.g., based on a letter from a U.S. employer). This is generally more likely in cases of working-age sibling sponsors, or parents sponsoring working-age children. In sum, INS does not compile aggregate data to determine the number of legal permanent residents who have had an affidavit of support signed by a sponsor.

There is an issue that has gained some prominence in the media, and is related to the alien deeming provisions under the SSI program. There have been cases publicized recently of legal resident aliens or naturalized citizens sponsoring their older parents for immigration into the U.S., and after the three year deeming period the parents immediately apply for SSI benefits on the basis of age. The perception exists that these families are abusing the system since the children sponsors often have sufficient income and resources to continue to support their immigrant parents, but instead take advantage of the current rules to gain access to entitlement benefits. SSI program data confirms that this type of situation is occurring. For example, of all current alien SSI recipients who have been--or are--potentially subject to the alien deeming rules, fully 25 percent--or 107,470 individuals--applied for benefits in their fourth year of residency in the U.S. The remaining 75 percent applied for benefits in a relatively evenly dispersed pattern among the remaining one-year increments (see Attachment I--aliens "Lawfully admitted" between 36 and 47 months). Further, of the 107,470 recipients applying for SSI in the fourth year of residency, almost 85 percent--or 89,510 individuals--applied for benefits based on age (see Attachment II)

DISCUSSION OF POLICY OPTIONS OUTSIDE THE PURVIEW OF HHS

Finally, some general observations should be highlighted on the effect of immigration--both legal and illegal--on HHS entitlement programs. On average, immigrants and refugees have less wealth and are worse off upon arrival than American citizens. This fact is usually the primary force behind both legal and illegal immigration. Thus, to the extent that more of these individuals enter the United States, there will be a relatively greater burden on our various entitlement programs, subject to the limitations discussed above. The Department has very little influence on the overall immigration/refugee policies that determine the overall flow of legal and illegal immigrants. The Departments of Justice--including the INS--and State, as well as the Congress, have much more influence on immigration policy per se. For example, the Congress expanded the number of eligible legal immigrants as recently as 1990.

Thus, as long as the numbers of immigrants and refugees continues to increase, the costs under our entitlement programs directly related to these individuals and families are likely to increase. The INS has estimated recently (1992/93) that there were approximately

11.5 million legal aliens, and 3.2 million illegal aliens, in the United States. The Census Bureau has found a slightly higher rate of participation in welfare programs—defined as General assistance, AFDC, and SSI—for immigrants than native born (5.9% for immigrants and 5.2% for native born). Whether the increase in economic activity generated by immigrants compensates completely for these increased costs is not clear.¹

While it cannot be determined unequivocally if immigrants represent a net economic benefit or cost to society, some general points emerge from the various research in this area. For example, it is clear that a disproportionate share of the costs of meeting the needs of immigrants is borne by local and state governments, while a disproportionate share of the revenues resulting from immigrants accrues to the Federal government. The implications of this situation are important since the Federal government is the only level of government with the constitutional authority to set immigration policies. Thus, to the extent the Federal government does not bear a proportional share of the costs of immigration policies, it may tend towards more open immigration policies than if those costs were more evenly shared. Further, localities—by virtue of being at the bottom of the hierarchical "pecking order"—are generally left with the greatest proportion of costs avoided by the Federal and state governments. This is especially true in tight budget times as the Federal and state governments seek to pass as many costs as possible "downward". This phenomenon was particularly pronounced in the 1980s. Finally, different states and localities are affected differently by immigration, with the Mexican border region being one obvious example of an area of the country that has high levels of immigration. Out of an estimated 8.7 million immigrants who entered the country

¹ Various studies have shown that the increased economic activity and tax contributions outweigh the increased costs on social service systems. Other studies have shown the opposite. In general, there are methodological problems with cost-benefit analyses in this area. For example, most analyses are static rather than dynamic and cannot answer certain relevant questions, such as, "if immigrants access entitlement programs, do they receive benefits for a longer or shorter period of time than native citizens?" Similarly, most immigrants—like the welfare population in general—make the transition from welfare to self-support, and a recent study has found that the average income of long-term immigrants (those who immigrated between 1970 and 1980) have higher average incomes than the general population. Finally, one needs to be careful in attributing costs/revenues to "immigrants" in general without distinguishing between refugees and other immigrants. Refugees are usually more needy than other legal immigrants, and many of the high rates of participation in some programs are likely due to the impact of refugees (e.g., if one controlled for refugees the higher rates of participation of "immigrants" may disappear). This is relevant because—as mentioned earlier—admission of, and policy towards, refugees is separate from general immigration policy due to a host of factors such as history, law, humanitarian concerns, shifting foreign policy priorities, etc.

between 1980 and 1990, more than half settled in two states: California with about 3.3 million (38%); and New York with almost 2 million (14%) (see Figure 1 attached).⁹ Similarly, some immigrant groups may be more of a burden on social systems than other immigrant groups. Thus, estimates that rely on national averages or per capita measures should be viewed with caution.

Regardless, it is clear that an important part of this country's social and political traditions have rested on the principle that we are an open society of opportunity and a melting pot of different peoples. It is also clear that the current Administration wants to maintain that tradition.

At the same time, the Administration has proclaimed recently the goal to reduce the flow of illegal immigrants and to reform the process of granting asylum—which would effectively limit the number of asylees granted entry into the U.S. If these goals are achieved, then the costs to our entitlement programs would also be reduced. Fewer illegal aliens would likely mean less costs associated with emergency medical services for those aliens. Fewer asylees would likely mean fewer PRUCOL aliens eligible for entitlement benefits.

Other policies that could lessen the impact of aliens on our entitlement programs are similarly outside the strict purview of HHS. For example, with regard to alien deeming discussed above, if the INS required all legal permanent resident aliens to have a signed affidavit of support identifying a sponsor, this would likely reduce the number of aliens eligible for entitlement benefits.

⁹ These are Bureau of the Census estimates of "foreign born entrants", and are thus not adjusted by the number of immigrants who may have left between 1980 and 1990 (i.e., not adjusted for out-migration). Also, the Census category of "foreign born" includes illegal aliens and legal aliens who may have adjusted to citizenship status.

San Francisco Chronicle

The *Chronicle* has had significant coverage of welfare reform in the past year. Its coverage consists mainly of news reports on Proposition 165 and related reform proposals by Governor Wilson and individual counties. Although recognizing the need for support services for welfare recipients who work, the paper generally seems to support tougher measures that provide work incentives. Key news reporters include Jonathan Marshall, Dan Levy, Vlae Kershner (Sacramento Bureau), and Greg Lucas (Sacramento Bureau). Unlike its State coverage, the paper has not had very much coverage of welfare reform as part of a national agenda.

Specific articles include:

August 14, 1992: Debra J. Saunders, commentary, "Clinton's plans vs. his donors":

Saunders comments on Clinton's campaign proposal of a workfare plan wherein able-bodied mothers would have to work after two years of receiving aid. Saunders takes the position that this plan sounds good, but does not believe that Clinton could implement it because of labor interests. She points out that unless Clinton paid welfare mothers well above minimum wage, public employee unions would take the plan to court. Meanwhile, if he does pay them high wages, it would cost too much and he would make enemies of non-welfare, low-paid workers.

September 9, 1992: Vlae Kershner, news, "Prop 165 will hurt children, report says":

Kershner reports on the debate over CA's Proposition 165 of 1992. He reviews a report released by Stanford University law professor Michael Wald, former director of the Stanford Center for the Study of Families, Children and Youth. Wald challenges the initiative, saying it is likely to lead to declines in the health, school performance and emotional well-being of many poor children. He said further that the proposal is the only one in the U.S. that does not exempt mothers of infants from cuts without providing adequate child care. A representative from the State, as well as Robert Rector from the Heritage Foundation, support the proposition because of its work incentives.

September 21, 1992: Arthur Hoppe, commentary, "Stamp out the welfare bums":

Hoppe pleads for voters to get out and vote for Prop 165. He criticizes the welfare system for its lack of incentive, saying, "We must inculcate these worthless loafers with the middle-class values are under attack from the so-called Social Security

system. Think of the millions of blue-haired widows lolling in front of their tee-vee sets at public expense."

September 28, 1992: Jonathan Marshall, news, "Experts debate whether Prop. 165 can help the poor":

Marshall, too, reviews the debate over Prop 165 and the philosophical stance it takes toward welfare. He reports that, "Besides testing the willingness of voters to continue subsidizing poor families, the measure will test their belief that welfare is more a cause than a consequence of poverty." Marshall reviews the opinions of several academics who mostly agree that the initiative would hurt families. However, he notes Peter Gottschalk, a Boston University economist, as the first scholar to offer evidence, in an unpublished paper, that the welfare system itself is a modest cause of its recipients' dependence.

September 30, 1992: Jonathan Marshall, news, "Studies dispute welfare migration theory":

Here Marshall again reports on the debate over Prop 165, but focuses on its state residency provision. The provision addresses a widespread claim that California is attracting welfare recipients from out of state to collect generous benefits at taxpayers' expense. He quotes several academics, including Tom Corbett, who say that the difference in state levels has little effect on migration of welfare clients.

October 1, 1992: Jonathan Marshall, news, "Welfare reform plan called bad for San Francisco":

Once again Marshall looks at possible impacts of Prop 165, this time examining its effect on San Francisco. A report released by the Mayor's office warned that the initiative could make thousands more people homeless and burden the City with the cost of supporting them. The City report said that when the State cut welfare benefits by only 4.4 percent the year before, the demand for family shelter soared. For instance, in the eight months following this cut, the Hamilton Family Shelter turned away an average of 280 people a month; a 344 percent increase over its previous average.

November 12, 1992: Vlae Kershner, news, "State limit on newcomers' welfare OKd":

Kershner reports on the Bush administration's approval of California waivers to implement the state residency provision of their budget compromise as well as the 5.8 percent cut in welfare grants.

December 13, 1992: Dan Levy, feature, "When work and welfare are not enough":

Levy focuses on the case of a welfare mother who is working part-

time at low-wages and looking for full-time work. She is struggling to pay her rent, her bills, and raise her two children. Levy emphasizes the difficulty of working mothers on AFDC who, despite the rejection of Prop 165, have still endured cuts in their monthly benefits.

December 22, 1992: Greg Lucas, news, "Suit filed to block new welfare law":

Lucas reports on the suit filed against the State's new residency provision that had passed in its budget compromise. Lucas quotes Sarah Kurtz from the Legal Aid Society of San Mateo County who explains that welfare recipients moving to California cannot possibly live on the amounts they could exist on in their former states. A staff article the following day reports on the Court's preliminary injunction against the State's implementation of the residency provision.

December 31, 1992: Greg Lucas, news, "US won't allow variable welfare cuts":

Lucas reports on the federal government's denial of California's request to impose smaller cuts in monthly payments to welfare recipients and the aged, blind and disabled who live in high-cost areas of the State.

April 14, 1993: Debra J. Saunders, commentary, "Aid to Families with Dependent Adults":

Saunders applauds Eloise Anderson, the California director of social services, who had been quoted as saying, "What's wrong with working at McDonald's?...We have taught people to believe that they're too good for certain jobs." Saunders supports the work incentive provisions that Governor Wilson has proposed as a way of placing more responsibility on welfare clients.

May 18, 1993: Judy Ronningen, news, "Alameda County to pay welfare hiring subsidies":

Ronningen reports on Alameda County's decision to offer to pay employers to give welfare clients a chance at a permanent job. A company can be reimbursed for 13 percent of an employee's salary for as much as half a year if he or she is hired off the general assistance welfare rolls. Ronningen offers examples of success stories under the program as well as some businesses which simply cannot afford to hire anyone and some which do not like the idea at all of subsidized hiring and refuse to be involved.

May 20, 1993: Ann Bancroft, news, "Senate panel rejects Wilson's welfare cuts":

Bancroft reports on the defeat of Gov. Wilson's plan to cut welfare benefits again by up to 19.2 percent for single mothers. The Senate instead passed the Cal Learn program, would give cash

bonuses for aid recipients who stay in school and reductions for those who refuse to work.

June 3, 1993: Gov. Pete Wilson, commentary, "Reform will make welfare work":

The Governor writes in defense of his approach to welfare reform. He explains that welfare discourages work and self-sufficiency. He offers his proposed obligations for welfare clients: that recipients refrain from having more children while on public assistance, that recipients strive to remain drug-free, that teenage parents on welfare stay in school, and that recipients work at least part-time.

July 5, 1993: Editorial, "Welfare system's integrity is vital":

The author writes in support of San Francisco County's proposal to bolster the integrity of its GA program by requiring the fingerprinting of applicants.

July 27, 1993: Editorial, "The working poor need some help":

The author writes in support of Clinton's proposed expansion of the earned income tax credit in his budget plan. The article says, "Paying subsidies to the working poor is far cheaper than giving them welfare, and it provides them with a solid incentive to become self-supporting."

August 12, 1993: Dan Levy, news, "Two thumbs down for fingerprinting plan":

Levy reports on the rejection of Mayor Jordan's fingerprinting proposal by a San Francisco Board of Supervisors committee, almost ensuring that the idea will go before voters in November. Supervisors quoted said that the plan was "undignified and invasive, saying it would further disenfranchise poor people in the city."

September 16, 1993: Ron Sonenshine, news, "Sonoma board takes a risk on welfare":

Sonenshine reports on Sonoma County which has imposed a 90-day limit on general welfare benefits since 1982. The County would strip benefits from recipients who have been collecting since 1982 and who have not, within 90 days, found a job. He reports that a related law in San Diego County has been rejected by a Court ruling which said that the County could not impose such restrictions because of "fiscal difficulty." Sonenshine quotes Richard Rothschild, an attorney with the Western Center on Law and Poverty in Los Angeles, who said that Sonoma County "is breaking the law."

Sacramento Bee

Welfare reform has been a very prominent issue in the Bee's coverage over the past year. The paper has taken a somewhat liberal position on the issue. It covers closely Governor Wilson's reform proposals and has generally not supported his approach to welfare cuts. Its coverage focuses mainly on the State reform proposals and the debate locally over an approach to welfare reform. Some articles do, however, expand the discussion to the national level with Clinton's vision for reform and general trends across the country. The articles seem to support reform but are wary of Governor Wilson's approach. The key reporter on this issue seems to be Nancy Weaver who has written several lengthy articles in which she presents the debate over differing approaches to reform. She generally presents both sides of the issue but always seems to interview specific clients and more experts who support Clinton's reform plan and who oppose Wilson's reforms.

October 8, 1992: Ricci R. Graham, news, "Counties urged to dump load":

Graham reports on a meeting of CA State Association of Counties during which the counties urged that the Federal government to provide welfare and educational funding for immigrants, programs now funded by the counties.

October 18, 1992: Nancy Weaver, news, "Welfare reform targets system and recipients; Prop 165 would cut family, teen mom aid":

Weaver's article, in discussing Proposition 165, focuses more generally on the national trend in welfare reform. She looks at Prop 165 which would cut public assistance and tie welfare payments to good behavior. Lawrence Mead, associate professor at NYU, defends reforms such as Prop 165 that expect more responsibility on the part of the recipient. On the other hand, Ed Lazere from CBPP and Paul Legler point out shortcomings in the California initiative. Legler says the answer to welfare reform is "more jobs and support services like job training, health care coverage and child care for welfare recipients." Weaver discusses similar paternal reform movements in other states and also interviews several welfare clients who would be especially hurt by the cuts that California was proposing.

November 9, 1992: Eva Schiorring, commentary, "Welfare's investment in despair of clients":

Schiorring looks at welfare recipients such as Karen Huggins from San Francisco who see self-employment as the best way for them to gain self-sufficiency. Programs such as Self-Employment and Enterprise Development in California help clients to build a small business with minimal capital investment. However,

Schiorring explains that the welfare system itself is their greatest obstacle. Particularly its asset-limitation rule keeps recipients from succeeding in self-employment. Schiorring also blames politicians, whom she says, "spend more time pointing their finger at the third-generation welfare mother than on identifying and removing obstacles to self-reliance."

December 1, 1992: Nancy Weaver, news, "Welfare grants cut again; residency crackdown begins":

Weaver reports on the implementation of welfare reforms passed in California's budget compromise; namely, the grant cut of 5.8 percent and the residency requirement. Weaver quotes Casey McKeever, directing attorney with the Western Center on Law and Poverty, as saying, "The immediate effect is less money to cope with very basic needs."

December 22, 1992: Edgar Sanchez, "Suit challenges welfare cut for California's newcomers":

Sanchez reviews the suit filed by several legal aid organization's against the State's residency provision. Sanchez reports on both sides, but explains in detail the situation of one plaintiff, DeShawn Green, who is especially hurt by this law.

January 12, 1993: Herbert A. Sample, news, "Wilson may again take welfare cuts to voters":

At a luncheon before the Sacramento Press Club, Gov. Wilson said that voters will likely face another welfare initiative in 94 if legislators do not pass his welfare cuts proposed in his 93-94 budget. He also said that the federal government must appropriate nearly \$1.5 billion to California to finance social and health services provided to illegal immigrants. Sample talks to Casey McKeever who criticizes the Governor's reforms. Finally, Wilson speculated that Clinton would be receptive to funding requests by California because he strongly supported such relief as a member of the NGA.

February 3, 1993: Leo Rennert, news, "President vows push for reform of welfare":

This article reviews Clinton's speech to the NGA in which he unveiled his plan to reform the welfare system. It emphasizes the role of education and training as well as child care and health care for working parents, in exchange for a two-year time limit on welfare benefits. Rennert also reviews the President's four principles for reform.

February 10, 1993: Laura Mecoy, news, "Study: State a leader in welfare cuts":

Mecoy reports on the release of a report by the Center for Budget and Policy Priorities and the Center for the Study of the States

naming California one of the three states with the most dramatic welfare cuts in 1992. Mecoy presents both sides of the issue, Iris Lav, the report's principal author, who criticizes the State for its cuts, and a representative from the Governor's office who explains the State's deficit situation.

February 19, 1993: Cynthia Hubert, news, "Welfare proposal sparks fear; some say requiring work after two years could be disastrous":

Hubert reports on President Clinton's speech in which he vowed to "end welfare as we know it," and said he would propose a plan that would offer all the essential support services but would require welfare recipients to work after two years. Hubert presents both sides of the issue. She quotes California State officials, a representative from the Children's Defense Fund, and a welfare client who all agree with the President. She also spoke with Kevin Aslanian from the Coalition of California Welfare Rights Organizations and another welfare client who are afraid of the concept of a two-year limit.

March 1, 1993: Douglas Besharov and Karen Baehler of American Enterprise Institute, commentary, "The unkindness of welfare cuts":

This piece argues that the federal government and "the categorical nature of federal poverty programs" should be partly to blame for the welfare cuts that have been implemented in several of the more generous states.

April 22, 1993: Dan Bernstein, "Wilson's welfare cuts hit snag":

Bernstein reviews activity in the State Assembly whereby the Human Services Committee rejected three welfare reform bills pushed by Wilson. One of these measures would have cut benefits to recipients by up to 19 percent, saving the State about \$500 million. The Committee did vote for the Cal Learn program and for expanding another job search program.

May 11, 1993: Barbara Vobejda, Washington Post, "Clinton seeks to end welfare trap":

The Bee printed this article by Vobejda which outlines the President's vision for reform of the welfare system. It mentions a task force, quotes David Ellwood, and lists the four principles for reform.

May 19, 1993: Editorial, "Welfare E Block Again":

This editorial looks at two pending welfare reform bills in the State legislature. It opposes a bill sponsored by Sen. Tim Leslie on behalf of Gov. Wilson that would cut grants by nearly 20 percent, calling it "a cut - not a reform, as the administration seeks to portray it." The other bill, sponsored

by Sen. Mike Thompson, the paper regards as "somewhat more like reform." This bill supports the Cal Learn program and seeks to reduce paperwork and administrative costs by consolidating the eligibility rules for AFDC, food stamps, and Medi-Cal.

May 23, 1993: Nancy Weaver, news, "Same goal, different ideas on welfare limits":

Weaver looks at the similar time-limit proposals of Governor Wilson and President Clinton. However, she is quick to point out the essential difference in their approaches. Governor Wilson, who has proposed a five-year time limit on welfare benefits, will simply cut benefits. Clinton, on the other hand, is considering a two-year limit but is also considering spending \$6 billion for education and training programs and support services for clients. Weaver talks to several experts including Paul Legler and Casey McKeever who defend the President's vision as very different from Governor Wilson's. She also speaks with several welfare clients who would be hurt by Wilson's proposal.

July 1, 1993: Nancy Weaver, news, "Disability, welfare cuts less than feared":

Weaver reviews the most recent budget passed by the State legislature which includes a 2.7 percent cut for AFDC recipients. However, adopted with that cut were rule changes to allow working families getting AFDC to keep more of their earned income without having their aid cut and to receive child care benefits from the State. Casey McKeever emphasizes that this is the third year that welfare assistance has been cut to balance the budget, but he adds that several of the new reforms will benefit welfare families.

July 2, 1993: Denny Walsh, news, "Judge allows plan involving welfare cuts":

Walsh reports on the decision of a federal judge which endorsed the concept that welfare cuts might serve as a work incentive, and he refused to halt an ongoing California experiment based on that premise.

July 13, 1993: Tony Bizjak, news, "Calls escalate to better regulate immigration; state study dispels immigrant welfare myths":

Bizjak reports on a State Senate report that found that long-time immigrants in California are slightly less likely to be on welfare than are native-born residents. The report's author, Rebecca LaVally, explained the findings saying, "The longer they [immigrants] stay here, the more likely they are to learn the language and assimilate into our economy...Literature suggests that appears to be their goal initially, and they need a period of time to achieve it."

July 26, 1993: Nancy Weaver, news, "U.S. study rips welfare system, calls for easy access and elimination of confusing, complex rules":

Weaver reports on a federal report released that said "the public welfare system is being choked by complex and confusing rules that waste the time of social workers and frustrate the people applying for aid." Weaver talks to Zy Weinberg, California/Nevada Community Action Association project director, who served on the committee that wrote the report. He explains that the country needs to start over with a clean slate and provide one system of assistance to cover needs currently addressed by AFDC, food stamps, medicaid, etc.

Thursday, October 7

Itinerary and Briefing

The first day of the regional visit to California is designed to provide an opportunity for members to gain firsthand knowledge about different approaches to welfare reform being taken in three counties: Alameda, San Francisco and Contra Costa. To this end, we will be meeting informally with county officials, program directors, and GAIN participants.

Breakfast Briefing/Meeting (8:00-9:15)

The day begins at 8:00 in the State Room of the Fairmont Hotel with a 15 minute briefing/overview of the regional visit. At 8:15, you will be joined for breakfast by elected and appointed county officials from around California who have been invited by the National Association of Counties. The breakfast should be relatively informal with a brief presentation by the Chairs followed by questions and discussion. The meeting will end at 9:15, and we will depart for Alameda county at 9:30. The list of invitees to the breakfast follows the schedule in this section of the briefing book.

San Francisco Chronicle Editorial Board (9:00)

Two of the Working Group chairs will visit the San Francisco Chronicle editorial board. A car will be waiting outside the hotel at 9:00 to take you to the Chronicle and then to Alameda to rejoin the Working Group.

Alameda County Site Visit

The Working Group will spend the morning at the offices of the Alameda County GAIN program. The first part of the morning will be spent with staff and clients from the San Francisco GAIN program who are coming over to meet with us in Alameda. From 10:00 to 10:30, we will get an overview of the program from the staff, and from 10:30 to 11:45, we will be conducting focus groups with participants.

During lunch, beginning at 11:45, staff from the Alameda program will give their perspectives on the GAIN program. They feel very strongly about the value of a human capital development approach to education and training programs. Their program provides a strong contrast to labor force attachment models such as Riverside County. Focus groups with participants from their program follow lunch until 1:45. Descriptions of both counties' programs can be found later in this section.

Contra Costa County Site Visit

After Alameda, the Group will go to Contra Costa County to visit the GAIN program in Richmond, Ca. This county's program is going through a major change in direction as it shifts from an approach like Alameda's to one more like Riverside's. The staff has a lot of interesting perspective on the value of the two approaches and its reasons for the change in direction which it will share with you, prior to a final focus group with Contra Costa program participants.

At 4:30, we will depart for Sacramento. We anticipate arriving at the Sacramento Hilton between 6:00 and 6:30. You are free to make dinner plans on your own for the evening.

02:30 PM

Site visit/focus group/staff meeting with Contra
Costa County GAIN program

Location: Contra Costa County GAIN Program
3045 Research Drive
Richmond, CA

Evening

Hilton Inn
2200 Harvard St.
Sacramento, CA 95815
(916) 922-4700

**List of County Attendees
Breakfast With Welfare Reform Working Group**

County Welfare Directors

John Cullen	Merced County
Konnie Lewin	Yuba County
Ray Merz	Placer County
Richard O'Neil	Santa Clara County
Yolanda Rinaldo	Sonoma County
Ceol Steppe	San Diego County (invited by Working Group)

County Supervisors

Grantland Johnson	Sacramento County
Susan Lacy	Ventura County
Kevin Shelley	San Francisco County
Barbara Shipnuck	Monterey County
Helen Thomson	Yolo County

County Administrator

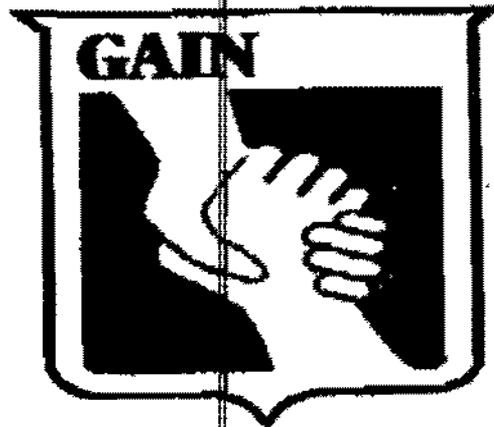
Paul McIntosh	El Dorado County
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Staff

Frank Mecca	County Welfare Directors Association
Karen Keesler	Ca. State Association of Counties

Alameda County

GAIN Program



**October 7, 1993
310 - 45th Street
Oakland, California**

OVERVIEW OF THE ALAMEDA COUNTY GAIN PROGRAM

The Greater Avenues for Independence (GAIN) program operated in Alameda County exemplifies the spirit and intent of the 1985 California legislation and the 1988 federal Job Opportunities and Basic Skills Training Act which created and fund the program. Alameda County GAIN assures each participant, needs-based access to, and informed choice regarding, a complete array of education, training, job and supportive services. All services focus on the goal of participant independence from welfare through employment.

Unique Aspects of Alameda County GAIN

The Alameda County GAIN Advisory Council was established in 1986 to involve the community in planning how to implement GAIN to best meet Aid to Families with Dependent Children (AFDC) recipient needs as perceived by the recipients themselves and their community. The Council has engendered community ownership of local welfare reform. Alameda County is the only GAIN County with a permanent community advisory body. Please refer to Attachment 1 regarding the GAIN Advisory Council.

The GAIN Ombudsman is a second unique aspect of Alameda County GAIN. The Ombudsman is a participant advocate who proactively supports good communication through individual and group meetings with participants and through monitoring and evaluation of program components and sites.

GAIN as Welfare Reform

Receipt of Aid to Families with Dependent Children (AFDC) in California is currently "conditional" on participation in GAIN, California's welfare reform program. Due to the lack of resources to provide GAIN to all AFDC recipients in Alameda County, GAIN as welfare reform in terms of reform of the local welfare institution has not been tested. With full state and federal funding, GAIN could begin to address institutional reform.

In Alameda County, however, GAIN has achieved two other primary goals:

- GAIN has changed the lives of numerous welfare recipients who are now independent of or on the way to independence from the welfare system.

By mandating their services to GAIN participants,

- GAIN has developed a new level of cooperation and coordination with local institutions and other service providers. Adult schools and community colleges have improved access and program design for welfare recipients.

When significant nationwide illiteracy compounds the inability of the national work force to compete in a global economy, an investment in basic and vocational skills must be a key to local and national welfare reform. Any new national welfare reform strategy should build on the strengths of the GAIN model: local control; a comprehensive array of education, training, job and support services; and, individualized service strategies leading to independence from welfare through employment.

Comments on MDRC Findings

Alameda County is one of the six study counties for the Manpower Demonstration Research Corporation's (MDRC) long-term GAIN evaluation. However, when reviewing the MDRC findings to date, it is critical to remember that Alameda County GAIN in 1993 is significantly different from the 1989/1990 Alameda County GAIN described in the MDRC research.

Therefore, while the research findings have specific application, there is danger in extrapolating the findings to fuel a welfare reform debate or to assuage current frustration with the costs of welfare and capital investment strategies. For example, the findings have stirred a debate about the "Riverside Model", when in fact the Riverside County and the Alameda County GAIN programs are merely local variations on a theme. For purposes of clarification, some of the Alameda County information below is presented in comparison to Riverside County.

There is a need for a standard national model for continuous evaluation of the GAIN/JOBS program, so that policy discussions can focus on current data. Evaluation emphasis should be on two critical success factors: hourly wage at placement; and, job retention rate.

Alameda County GAIN Hourly Wage at Placement and Job Retention Rate

Alameda County GAIN's average starting hourly wage has consistently increased:

- \$6.98 in FY 90/91 (13th highest in California)
- \$7.14 in FY 91/92
- \$7.38 in FY 92/93

By comparison, Riverside County GAIN has achieved a low average starting hourly wage:

- \$5.67 in FY 90/91
- \$5.70 in FY 91/92 (last available info from state).

More interesting, however, is this comparison of all Alameda County GAIN jobs from 1988 through June 1993 (see Chart 1) which demonstrates that participation in any GAIN service beyond Appraisal and Basic Education significantly increases the average starting hourly wage:

- \$5.92 average hourly starting wage for those employed from appraisal or Basic Education
- \$7.63 average hourly starting wage for those employed from Job Club/Search, Assessment or any post-Assessment component

In regard to job retention, 86% of the cumulative number employed through June 1993 were still working after 30 days.

Why is Alameda County GAIN Different Now?

As the MDRC reports state: "... some of the information does not portray the counties' current modes of operating GAIN. All of the counties have continued to review their implementation strategies as they have acquired more experience in operating this very complex welfare-to-work initiative, and in response to changes in funding and other circumstances".

In the research study period in 1989/90:

- 51% of the experimentals had been on AFDC 9 or more years.
- Only 20.2% had been on AFDC less than 3 years.

The long welfare dependency and lack of recent work experience of the majority of the experimentals resulted in the following component usage rates for the experimentals:

- 61% entered Basic Education as a first component.
- As of 6/89, 61% of active participants were still in Basic Education.
- As of 6/89, only 39% were in skill training, job search or PREP.

In contrast, the 1992/93 picture of Alameda County GAIN was much different:

- 13.2% of new appraisals have been on AFDC 9 or more years.
- 40.2% of new appraisals have been on AFDC less than three years.

Because of different participant demographics, there were different participant needs as demonstrated by the following component usage rates:

- 46.3% of new appraisals entered Basic Education as a first component.
- As of 6/93, 39% of active participants were in Basic Education.
- As of 6/93, 61% were in skill training, job search or PREP.

Concurrently, the percent of the cumulative number appraised from 1988 - 6/93 who got jobs has consistently increased from 14.1% in 12/91 to 18.9% in 12/92 and 19.5% in 6/93.

The MDRC reports of the 1989/90 Alameda County GAIN program created a lasting picture of Alameda County as a basic education program emphasizing career exploration rather than job entry. As demonstrated by the changes in the program since 1989, Alameda County GAIN is a responsive program, constantly striving to model legislative spirit and intent.

Significance of Local Demographics and Economic Factors

MDRC reports a conditional impact analysis which demonstrated no change in impacts when controlling for demographics. We remain convinced that demographic as well as economic differences play an important role in impact differences as well as in program design differences. Chart 3 demonstrates the significant demographic differences between Alameda County and Riverside County GAIN participants in a recent three month period.

While Alameda County's unemployment rate and employment growth rate are comparatively low compared to those of the other MDRC study counties, 66% of GAIN participants live in and primarily access the Oakland labor market where the "hidden" unemployment rate is estimated at more than 25%. Oakland's current official 12.0% unemployment rate is higher than the County 7.7% rate, and the employment growth rate remains negative.

Alameda County on the Practices and Conditions Cited by MDRC as Contributing to Riverside Results

MDRC discusses that Riverside's results may be attributed to its particular combination of practices and conditions.

1. Pervasive employment message

Alameda County GAIN emphasizes employment to become independent of welfare. With Alameda County GAIN participant demographics and the Bay Area's poor local economy and high cost of living, getting "just any job" at minimum wage generally is not a constructive step for participants. Since the GAIN population is primarily female (82.5%) and AFDC-FG (83.4%), the burden of child care and wage disparities between men and women require even more emphasis on jobs that pay better than minimum wage.

Local experience in the 1980's with the failures of the Peralta Services Corporation Supported Work program and the "fast track" job search which resulted from the deterioration of the Work Incentive (WIN) Program provided ample evidence in support of the development of our current policy.

Rather than provide experience which leads to building job skills and a competitive work experience, our participants who take "just any job" develop a history of sporadic short-term jobs left due to unmanageable personal problems, financial crisis, or lack of skills. These experiences tend to diminish their self confidence and self-esteem and to increase their unemployability because of their record of poor attendance and failure.

2. Job Development Efforts

Employee performance standards are labor meet and confer issues and cannot be arbitrarily imposed in Alameda County as they are in Riverside County.

GAIN regulations require the use of existing resources until they are proven to be unavailable at sufficient levels. Up until 1992, direct job services through the Job Training Partnership Act system, the federally funded refugee program, and the Employment Development Department Job Agent program provided adequate levels of service for Alameda County GAIN. When the need for targeted job development and placement developed in 1992, Alameda County was in the middle of a County fiscal crisis that prohibited the expenditure of additional County share. Therefore, GAIN could not develop or purchase additional services. We are looking forward this year, with a new state and federal allocation, to developing and funding a specific GAIN Job Development component.

3. Strong Commitment to Securing Participation of All Mandatory Registrants

Alameda County has a similar strong commitment but has never had adequate state/federal resources to meet this objective. Last fiscal year, lack of County matching funds prohibited full expenditure of the state/federal allocation available.

Since the end of the MDRC random assignment period in 1990, funds have only been available to serve target group mandatorics who volunteer. This year, intake has expanded to include target group exempts who volunteer for the program. There has generally been a waiting list of up to one thousand.

4. Greater reliance on GAIN's formal enforcement mechanisms

Alameda County utilizes formal enforcement mechanisms to the full extent allowable by law. Since 1990, 1097 sanctions have been applied (19.4% of appraisals).

5. More equal use of job search and education and training activities

ATTACHMENT 1

**ALAMEDA COUNTY
GAIN ADVISORY COUNCIL**

1. Letter from the Chairperson
2. Goals and Objectives
3. Membership Roster



Alameda County

GAIN Advisory Council

310 45th Street
Oakland, CA 94609
(510) 596-0400
FAX [510] 547-1048

October 1, 1993

Working Group on Welfare Reform,
Support and Independence
Aerospace Building
370 L'Enfant Promenade
Washington, DC 20047

Dear Members of the Working Group:

On behalf of the Alameda County GAIN Advisory Council I would like to welcome you to Oakland, and express our hope that your visit to the Alameda County GAIN program is helpful for your deliberations.

Enclosed is the current statement of goals for the County program. It reflects priorities such as having GAIN participants obtain work which pays enough to enable them to stay off welfare, providing adequate child care and other support services, and linking vocational material with remedial education.

Since the passage of state legislation establishing GAIN, the Advisory County has developed priorities for the program and conducted oversight of progress toward the goals of the Alameda County GAIN Plan. Council members have also contributed resources to expand the program's outreach, augment its research and evaluation capacity, recruit employers as mentors, recognize participants' achievements, and otherwise enhance the effort.

The activities of the Advisory Council may be of interest to the Working Group for two reasons. First, many of the distinctive policies and practices of GAIN in Alameda County have emerged from the work of the Council. Second, the Council may be a useful model for local involvement in new federal education and training initiatives.

Victor Rubin, Chairperson

Larry Hardy, Vice Chairperson

Veronika Kot, Secretary

Working Group on Welfare Reform

-2-

October 7, 1993

The GAIN Advisory Council includes employers and present and former AFDC clients, representatives of organized labor, K-12 and higher education, legal advocacy, children's services, employment training programs, state legislators' offices, related County commissions and other sectors. This mix leads to serious and detailed debate about policies, and to greater public awareness and support for the program than would otherwise be found.

We look forward to your further inquiries about the program, and wish you the best of luck in your very important task.

Yours truly,



Victor Rubin, Ph.D.,
Chairperson,
Alameda County GAIN Advisory Council

ALAMEDA COUNTY GAIN ADVISORY COUNCIL
Statement of Goals for GAIN in Alameda County
Revised June 1993

I. General Goals

- A. Alameda County supports a high quality and positive program with the goal of unsubsidized employment for program participants. The employment goals should be for positions paying adequate wages, allowing reasonable advancement, and resulting in long-term independence from welfare.
- B. Alameda County intends to create and administer a GAIN program that will function efficiently while manifesting an enthusiastic and positive approach toward the attainment of program goals.
- C. The GAIN program will seek to engender in each participant a sense of self-esteem and confidence in his or her ability to attain the goal of unsubsidized employment.
- D. GAIN program requirements will apply equally to all registrants and participants. All participants shall have available the broadest possible range of education, training services and job services.
- E. The GAIN program shall provide the highest quality services possible through all phases of the program.

II. Program Goals

A. Employment

- 1. The goal of the program is to assist participants in obtaining permanent employment with a reasonable prospect of advancement.
- 2. Entry level jobs must pay not less than the participant's AFDC and food stamp benefits, plus the cost of payroll deductions, health care, child care, transportation and other work-related expenses.
- 3. Job services activities should focus on helping participants to locate permanent, full time employment at adequate wages as defined in item II.A.2.
- 4. The active involvement of private sector employers is essential to the success of the program.
- 5. A strong job development component is needed.

ALAMEDA COUNTY GAIN ADVISORY COUNCIL
Statement of Goals for GAIN in Alameda County
page 2 of 4

B. Self-Employment

1. Participants who desire the opportunity to seek self-employment will be given assistance to reach this goal. Such participants must demonstrate a strong desire to achieve self-employment by completing required activities.
2. The active involvement of outside sources dedicated to economic development is essential to the success of the program.
3. The participants must be made aware of the small success rate associated with small businesses ventures and of the financial constraints associated with emerging businesses (low or no pay during certain periods).
4. Once the decision is confirmed to seek self-employment, all available resources should be utilized to encourage the participant's success.

C. Job Training and Education

1. Training programs should be keyed to jobs in both the public and private sector where there is a demonstrated labor market demand.
2. Existing programs should be expanded and new programs should be created as necessary to serve the target population.
3. Training, education, job development and job services other than "PREP" (workfare) should have priority.
4. PREP positions must provide training related to the participant's prior training and experience, and calculated to assist the participant in obtaining permanent employment at an adequate wage as defined in item II.A.2.
5. PREP positions must not displace current employees, fill established unfilled positions, or otherwise result in displacement of or loss of opportunities for current employees.
6. Once a PREP placement is completed, the participant should be assisted in taking advantage of other types of training as appropriate, and in seeking permanent employment at an adequate wage.

ALAMEDA COUNTY GAIN ADVISORY COUNCIL

Statement of Goals for GAIN in Alameda County

page 3 of 4

7. Self-initiated education or employment training programs should be encouraged if realistically calculated to achieve employment, and GAIN program requirements should not disrupt them.
8. Reasonable participant choice, rather than system needs, should govern. No participant should be forced into an activity which is incompatible with his/her needs, education and experience because other more suitable choices are currently unavailable. Participants shall be given adequate information and adequate time to assess available options.
9. Concurrent participation in education and training should be encouraged. Participants should be made aware of the option of concurrent enrollment and encouraged where appropriate.

D. Barriers and Supportive Services

1. At all stages, steps must be taken to ensure that participants clearly understand the GAIN program, their rights and responsibilities, and the supportive services which are available.
2. Necessary remedial education should be a priority. However, efforts should be made to infuse vocationally focused approaches into basic education. Special efforts should be made to counsel, assist and evaluate basic education participants who appear to be struggling with completion of their component. Staff should work with such participants to continue to develop realistic goals for education, training and employment, in light of the existing job market, the participant's abilities, learning barriers and achievements.
3. At all stages, county personnel, contractors and all others involved in the program should be sensitive to educational, social, physical, emotional and other barriers which may adversely affect successful participation, and should take steps either to remedy the problem or to exempt the participant until the problem is resolved.
4. Assessment, employment and personal counseling, and job search assistance should be provided by trained personnel, whose case loads are sufficiently limited so that they may provide effective and individualized services to each participant.
5. Participants should not be required to attend program activities until they can obtain child care with which they are satisfied. Participants shall be assisted in obtaining child care as near to their home or training site as possible.

ALAMEDA COUNTY GAIN ADVISORY COUNCIL

Statement of Goals for GAIN in Alameda County

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6. The County should coordinate with child care resource and referral agencies, school districts, and other local providers in developing new child care resources, so that GAIN participants do not displace other low income children in need of child care.
7. The County should work with the community to stimulate new development of "natchiny" extended day care programs.
8. Transitional Child Care shall be made available to all persons eligible pursuant to law and regulation. Focused outreach efforts shall continue in order to notify all potentially eligible persons of the availability of transitional child care and in order to ensure prompt receipt of transitional child care.
9. Barriers such as lack of transportation or adequate clothing must be removed before participants are required to comply with any program activity.
10. Participants should be provided a list of independent agencies who can provide assistance, counseling, and advocacy services in the event of a dispute with county GAIN personnel.
11. Active and positively oriented informal and formal grievance procedures should focus on resolving failure of communication and removing barriers to successful participation in GAIN. Sanctions should be imposed only when good faith conciliation efforts have failed.

III. Program Implementation

- A. Operation of the GAIN program shall be closely monitored. Monitoring shall include solicitation of participant input as well as statistical data, and shall review quality of services provided, as well as quantity.
- B. Mechanisms shall be developed to avoid "creaming", so as to ensure that all participants have access to effective training and placement services.
- C. If necessary, participation in the program shall be limited so that at all times participants are given access to quality training, placement and supportive services.

ALAMEDA COUNTY GAIN ADVISORY COUNCIL
Membership Roster FY 93/94 (Pg. 1 of 3)

BUSINESS AND ORGANIZED LABOR CATEGORY

Central Labor Council

Tom Ledwona, Delegate.

President, Hispanic Employees Association of Alameda County.
Member: Alameda County Office of Education Industry Education Council; Office of the Mayor Clothing House Project; Bay Area Job Development Consortium; and, State and Chapter 535 Executive Board, Career Development Specialist, Alameda County.

Fred Reed, Delegate.

Senior Field Representative of Local 535.

Alternate: Frank Hernandez, Delegate.

Highlyly Technician, Alameda County.
Admnan, Union Negotiation Committee.
Substitute Teacher, East Side Union High School District, Santa Clara County.
Member, Santa Clara County Hispanic Forum.

Central East Oakland Merchants Association

Alfred Parkam, Chair

Member, Oakland/UC Berkeley, Metropolitan Forum; Business Tax Review Committee, City of Oakland; and Strategic Development Advisory Group California State Lottery.

University of California, Office of the President

Larry Hardy, Affirmative Action Officer.

Keiser Permanente Medical Care Program

Carl Lopez, Director of Staff Recruitment

and Development, Financial Services.
Chair, Joint Committee of Oakland Chamber of Commerce. Co-chair, Advisory Committee, McClymonds High School Business Finance Academy/R.O.P.
Member, Oakland Private Industry Council; Alameda County Industry Education Council; and, North Alameda County Regional Alliance for Educational Development.

Home Services of America

Robert Rwaan, Vice President.

Board Member, New Oakland Committee; Boston Youth Center. Member, Men of Tomorrow; Bay Area Urban Bankers; Oakland Convention and Visitors Bureau; Oakland Chamber of Commerce; Northern California Organization; and, Oakland Business Development Corporation.

CLIENT SECTOR CATEGORY

Local AIA Society, Alameda County

Yvonne Kot, Staff Attorney.

Member, ACLU, NOW, Planned Parenthood, Sierra Club.

Refugee Services Advisory Council

Walter Campbell-Meyer, Member.

Member, International Institute of East Bay.

GAIN Participants/AFDC Recipients

James Lewis, Bus Driver, AC Transit

ALAMEDA COUNTY GAIN ADVISORY COUNCIL
Membership Roster FY 93/94 (Pg. 3 of 3)

SERVICE ACTIVITIES CATEGORY

Urban Strategies Council

María Casny, Associate Executive Director.
Board Member, Teenage Parenting and Pregnancy Program.
Member, Oakland's Child Care Commission.

Norman: Angela Blackwell, Executive Director.
Co-Chair, Comm. for Positive Change, Oakland Public Schools.
Board Member, Center for Budget and Policy Priorities,
Washington DC; Public Private Ventures, Philadelphia; Alameda
County Oversight Committee on Infant Mortality; Poverty
Advocacy Research Center, New York; and, Children Now; The
James Irvine Foundation, San Francisco, Newport Beach, CA;
Foundation for Child Development, New York; The Urban
Institute, Washington, D.C.

Healthy Infant Program

Tremaine Lavina, Public Health Nurse
Chair, NQMN.
Member, Black Nurses Association

Calif. State University, Hayward

Charis Engalimosa, Ph.D., Psychologist, Consulting Services.
Member, Bicultural Association of Spanish Speaking Therapists and
Emergency Services Network.

County Office of Education

Evette Wesley, Director Education Workforce Project.
Director, Alameda County Economic Development Program
Workforce Project. President, Iron Delta Zeta Chapter.
Board Member, Youth Reach.

Education, Career Development
and Management Services

Carolya Schmidt, Partner, C & L Consulting
Secretary, Hayward South Rotary Club.
Chair, Immigration Services, Rotary District 5170.

Business Community, Financial
and Entrepreneurial Services

James Vangelis.
Consultant, Adeline Cleaners, Inc; Meri Coon Contractor; and, OIA
Associates.

City of Newark

Olga Estrada, Human Services Director.
Board Member, Spectrum Community Services and Theresa
Villquez Medical Clinic.
Member, Oakland A's Hispanic Advisory Committee.
City Representative, Tri-Cities Homeless Coalition and Tri-City
Pura Trust Program.

Oakland Private Industry Council

Loesa Fields, Chair.
Manager, United Airlines, Facilities.

University/Oakland Metropolitan Region

Victor Rubin, Associate Director.
Principal Analyst, University of California
at Berkeley Institute of Urban and Regional
Development. Berkeley Planning Associates. Board Member,
Children's Advocate (newspaper) and Oakland Study Center.

ALAMEDA COUNTY GAIN ADVISORY COUNCIL
Membership Roster FY 93/94 (Pg. 3 of 5)

COMMISSIONS AND LEGISLATORS CATEGORY

Staff Services Commission

Robert Smith, Commission Chair

Partner, Smith, Patton & Company, Certified Public Accountants.
Past President, Optimist Club of Oakland. Board of Directors, East
Oakland Rotary and Alameda County Food Bank. Vice President,
Project Outreach.
Ex Officio Board Member, First Agricultural District.

Myra Reynolds, Commissioner

Member, Sister City Commission, Union City.
Staff Services Assistant, Alameda County.

Alternate: Rebecca Turner, Commissioner

Commission on the Status of Women

Linda Perry, Commissioner

City Council Member, City of San Leandro.
Member, Alameda County ITFA Crisis Advisory Board.

Assembly Member Klein's Office

Kevin Miller, Field Representative

CHART 1

ALAMEDA COUNTY GAIN PROGRAM
EMPLOYMENT STATISTICS

CUMULATIVE 9/88 - 6/93

COMPONENT	NUMBER EMPLOYED	NEW ATTENDED	PERCENT EMPLOYED/ ATTENDED	AVG WAGE	HIGH	LOW
APPRAISAL	65	5,647	1.2 %	\$5.88	\$10.83	\$4.25
ABE	114	1,392	8.2 %	\$6.01	\$21.00	\$4.25
OED	61	1,035	5.9 %	\$6.18	\$15.01	\$4.25
ESL	30	345	8.7 %	\$5.15	\$12.00	\$4.25
JOB CLUB/SEARCH						
ASSESSMENT						
POST-ASSESSMENT						
TOTALS	1,103	5,647	19.5 %	\$7.21	\$22.00	\$4.25

The average starting wage for those employed from Appraisal or Basic Education components (the unshaded area above) is \$5.92/hour.

The average starting wage for those employed from Job Club/Search, Assessment or any post-Assessment component (the shaded area above) is \$7.63/hour.

The average wage includes 18 jobs which pay less than minimum wage; most in child care/elder care and 2 on commission only basis.

**STATE CHARACTERISTICS REPORT
 QUARTER: 4/83 - 6/83**

	ALAMEDA Total	RIVERSIDE Total		ALAMEDA Total	RIVERSIDE Total
Registrants	557	2,642			
AFDC-FG	83.4%	88.7%	Educational Background		
AFDC-U	16.6%	11.3%	No H.S. Diploma/GED	52.0%	53.9%
Mandatory	76.0%	66.6%	H.S. diploma/GED	46.0%	42.0%
Exempt (kids under 5)	24.0%	33.3%	Some College	2.0%	4.7%
			4-yr College Degree	0.0%	0.0%
AGE			Ever on AFDC?		
Under 20	3.7%	9.7%	No	0.0%	6.9%
20-24	30.2%	17.0%	Yes, Less 2 yrs.	80.0%	46.7%
25-29	28.1%	20.6%	Yes, 2 yrs or more	70.0%	44.7%
30-34	17.7%	23.0%	Employed Past 24 Months?		
35-39	14.9%	19.9%	Yes, less 1 month	2.7%	5.4%
40-44	7.4%	5.3%	Yes, 1 month or more	28.7%	52.3%
45-49	0.0%	3.6%	No	67.6%	41.4%
50-54	0.0%	1.6%	Current Weekly Employment?		
55 or older	0.0%	0.6%	Under 15 hrs./week	0.4%	1.9%
SEX			15-29 hrs./week	0.9%	5.2%
Male	12.6%	29.9%	30 or more hrs	0.0%	5.9%
Female	82.6%	71.1%	Unemployed	88.9%	46.4%
ETHNICITY			Not in Labor Force	60.1%	40.7%
White	14.0%	43.4%	Target Status		
Hispanic	5.4%	40.8%	Targeted	79.1%	37.7%
African-Amer.	61.3%	11.2%	Nontargeted	20.9%	62.3%
Asian	16.4%	3.2%			
Amer.Indian	0.0%	1.4%			
Filipino	0.0%	0.3%			

SUMMARY OF THE GAIN PROGRAM IN CONTRA COSTA COUNTY
October 7, 1993

Contra Costa County Social Service Department has been administering its GAIN program since May, 1988. The program, to date, has been operating according to State/Federal regulations, offering participants a full range of educational and job related activities which they access according to the prescribed "GAIN Flow" sequence. The program up until this time has been faithful to the original philosophy of the GAIN legislation which emphasizes longer term educational objectives rather than short term job entry.

In recent years, funding reductions have resulted in declining caseloads. The number of persons who could be served was limited by the county's child care resources. Intake was drastically curtailed in the fall of 1992 when, after having enrolled a number of Teen Parents in the program, our child care costs exceeded budget. In order to make more funds available for child care, we stopped contracting with our local Child Care Resource and Referral Agency and brought the child care payment function back in-house for a savings of approximately \$100,000 in contract costs.

The FY 1993/94 enhanced funding of approximately \$2.2 million gives us the resources to expand our GAIN Program and to fundamentally change its direction. The "Contra Costa County 1993/94 GAIN Preliminary Plan Update" outlines how we plan to do it.

We developed this plan for four reasons: 1) We are in agreement with the administration that welfare should be a transition to the workforce; 2) The impressive results from the Riverside model shows that there is a better way of operating; 3) Recent cuts in grant levels coupled with removal of the work financial disincentives means that AFDC recipients can significantly improve their standard of living by working. We would be doing our clients a disservice by not helping them find jobs to make up their losses or to discourage them from working in the short term while they pursue long term educational goals; and 4) We took a sober look at our past program performance. While many people have been helped in our program over the years and are now self-sufficient, we believe that a change in focus to a more job related program would help even more families improve their lives and achieve full status in a working society.

The changes which we will make are as follows:

1) Open intake, serve all mandatory participants and refugees in target groups. 2) "Bank" deferred cases and redistribute tasks to free Case Managers to serve more clients; 3) Upgrade our computer system; 4) Add staff, including 2 job developers; 4) Upgrade staff skills through training; and 5) Consult with Dean Curtis and Associates in the program redesign.

The first consultation with Dean Curtis is scheduled for October 8, 1993.

SUGGESTIONS FOR WELFARE REFORM

The Contra Costa County Social Service Department respectfully offers the following suggestions to improve services delivery in the GAIN/JOBS Program:

1. Simplify the regulations. They are too complex and ambiguous.
2. Permit flexibility in the GAIN "Flow." No one should be denied work search assistance or an opportunity to have work experience because they are in the wrong place in the "flow."
3. Remove the requirement of serving only targeted groups. People shouldn't have to wait until they have been on aid three years to be served in GAIN. This is incompatible with the administration's plan to impose time limits on receipt of welfare. It is a generally accepted fact that the longer people are on welfare, the more dependent they become and the more difficult they are to serve. No one should be denied services, especially job search assistance, because they have not been on welfare long enough.
4. If time limits are imposed, take into consideration some special factors such as language barriers, periods of illness/disability.
5. Simplify the conciliation/sanction process. The county is at a disadvantage during fair hearings because of all the possible technical errors which can occur in such a complicated process.

Friday, October 8

Public Forum

Morning Session

Breakfast

We will be departing from the hotel at 7:30 to get to the College by 8:00 for a breakfast with state elected officials and their staffs. The format will once again be informal, with an emphasis on informal discussion and questions and answers. The invitation list is provided following the schedule in this section of the book.

Morning Roundtable

The morning session of the forum focuses on lessons from California's GAIN program. It has been set up as a roundtable discussion with roughly twenty panelists including program directors, advocates and participants. The session has been broken into four sections, each led off by testimony from some of the panelists and followed by general discussion to be guided by the Chairs. The sections will be devoted to specific issues including: human capital development vs. labor force attachment, the role of child care, and improving participation.

Section One: Overview

The first section will provide an overview of the GAIN program provided by the Director of the California GAIN program (either Bruce Wagstaff or a representative), John Wallace from MDRC, and two clients from the program, one whose experience has been positive and one who has had trouble getting into the GAIN program. The purpose of this panel is to provide a general overview of the program before discussing more specific issues related to the program in our subsequent panels. A description of the GAIN program was provided in the California State Profile (Section 2 of the briefing book). As that summary indicates, the counties have considerable flexibility in shaping their programs, and this has led to several controversies over philosophical and structural approaches to welfare reform. The following three sections explore some of these differences, each of which will eventually have to be addressed in a national plan for welfare reform.

Section Two: Human Capital Development vs. Labor Market Attachment

The first question that we will address is that of the value of human capital development v. labor market attachment in a job training and education program for welfare recipients. As part of the flexibility of the State GAIN program, individual counties set their own goals with regard to the priority of employment in their program. Some counties choose to focus more on human capital development by encouraging participants to get more education and training in preparation for a well-paying job. These counties provide the education and training needed to put recipients into jobs where wages and benefits make it feasible for the client to work rather than stay on welfare. Other counties, however, choose to concentrate on moving participants into the labor market quickly, even if it means taking low-paying jobs. These counties consider any job a first step and believe strongly that advancement comes through work experience. Individual counties lean in one of these directions in varying degrees. Riverside and Alameda Counties, however, illustrate the two extreme approaches. Representatives from both programs will participate in this panel discussion.

Riverside -- The Riverside County GAIN program focuses strongly on labor market attachment by placing many of its clients immediately into jobs. The Riverside County GAIN managers and staff receive a strong and unequivocal message that their responsibility is to assist AFDC clients in becoming employed. The County enforces a minimum job performance standard of 12 placements per month per worker. This emphasis on employment exists in all components of Riverside's program. Orientation focuses on the expectation that all clients will become employed. Job Club is designed as a training ground to help clients understand the benefits of working, how to locate and secure employment, how to sell themselves, and how to use these skills in the future. Then, in Job Search, clients apply what they have learned in Job Club. Additionally, clients who are in basic education or training components understand they are there to improve their skill level so they can effectively enter the job market.

As MDRC reports in its April 20, 1993 review of GAIN after two years, Riverside had the most impressive results for single parents. In the second year, it raised the program group's earnings by \$1,179, or 53 percent over the group average. Its total improvement in earnings, over the first two years, reached \$2,099 per person. The County also saved \$701 in welfare payments in the second year, a 17 percent reduction compared to the amount of payments made to the MDRC control group. Total welfare savings reached \$1,397 per person after two years. These earnings and welfare impacts were the largest in any of the six counties studied by MDRC, and are larger, according to MDRC, than those found after just two years in previous large-scale welfare-to-work programs.

Alameda -- Alameda County's GAIN program, on the other hand, focuses much more strongly on human capital development. Its program consists of high personalized attention with a caseload size per case manager of about 75 to 1. Alameda has the highest rate of participation in basic education classes of the six counties studied by MDRC. In May of 1992, according to MDRC, the rate of participation in basic education classes among AFDC-FGs was at 39 percent and 42 percent among AFDC-Us. Furthermore, Alameda's job search activities are presented differently than those in Riverside. In Alameda, 26 percent of AFDC-FG recipients (as of May 1992) participated in job search activities. Their job search program focusses less on linkages to employment than on information activities to assist clients in choosing an education or training program based on career interests.

Section Three: Child Care

The second question addressed in the morning roundtable will be the role of child care in the GAIN program. How GAIN offers child care assistance and to whom has been an overriding issue that culminated in 1991 when several legal services organizations filed suit against both the CA State Department of Social Services and the Federal Department of Health and Human Services (*Miller v. Healy*). The plaintiffs argued against State policy that only provided child care to people who had been admitted to GAIN. People on waiting lists for GAIN or in non-GAIN education and training programs were ineligible for child care. The plaintiffs argued that the child care guarantee in the Family Support Act is a separate provision from the JOBS provision, and therefore, should be applied to all welfare recipients who are in education or training programs.

The plaintiffs also faulted the Federal Department of Health and Human Services' response to the issue. Based on the Court's decision, HHS issued Federal Action Transmittal JOBS-ACF-91-15 which says that every state has to provide some mechanism for child care for non-JOBS participants who receive welfare, but that the state could use fiscal criteria to set limitations on its funding of this child care. Basically, California said the money was not in its budget to fund child care for non-GAIN clients, and HHS supported the State in this decision.

In December 1991, the Federal Court in California ruled for the plaintiffs and issued an interim Court order by which California had to provide child care for all welfare recipients who were participating in a "State approved" education or training program. As a result, in July 1992, California implemented NET or Non-GAIN Education and Training program that provides child care and other supports for clients of non-GAIN programs.

However, the case is not yet closed. The question now lies in the definition of a "State approved" program and in the limitation on NET provisions. The plaintiffs argue that the

benefits for NET participants should be equal to those of GAIN participants, which would mean two years of child care while clients remain in the program. The State, however, has not provided equal treatment, limiting some NET clients' child care to under two years. The Court has not yet issued a final order on these claims. The ruling will result in either expanding the NET program and its benefits or giving the State the freedom to limit non-GAIN benefits.

This case and the issue of child care with regard to state education and training programs is not specific to California. Six similar law suits have been filed across the country, and rulings have come down in Illinois and Massachusetts that, like California, mandate that the State provide non-JOBS child care.

This panel will consist of two GAIN clients, one who has been provided with child care which has made the difference in her attaining self-sufficiency and another who has encountered numerous setbacks because of her lack of affordable child care. Joining them will be a representative of the California Child Care Resource and Referral Network, the California Child Care Program Director, and a representative of the Child Care Law Center.

Section Four: Raising Participation

The final question that we will examine is the issue of expanding participation. One of the main conclusions drawn from the MDRC first year GAIN report of May 1992 is that the counties with the highest participation rates achieved them under very different local conditions, with different types of staff, and using different implementation approaches. This indicates clearly that a variety of approaches may work to increase participation rates.

As MDRC reports, participation rates can be influenced by several factors:

- * Local economic conditions dictate whether jobs exist into which the county can place clients or whether clients can easily find the same jobs on their own. Responding to this issue, Riverside's job development component of the GAIN program aggressively locates job vacancies and recruits employers for GAIN clients.

- * GAIN service supply and quality can influence participation rates. For instance, in San Diego at the time of the MDRC first year report, the County was having problems with access to basic education which was provided through a network of specialized Learning Centers. There were not enough slots to meet the County's demand, and some clients were placed on waiting lists for several months.

* Background characteristics of case managers and supervisors as well as case management strategies can also affect the GAIN population. These two factors involve issues of personalized attention, focus on human capital development v. labor market attachment, etc.

* The level of formal enforcement of noncompliance in a county affects the level of participation. There is in GAIN an official multi-step process for imposing penalties when clients do not attend their assigned activity. The final step in this process involves a reduction in the client's welfare grant. Counties administer these penalties in varying degrees.

Profiles of the clients and biographies of the panelists who will be testifying in the morning are presented in the pages that follow (available only in the final version of the briefing book which will be available on arrival in California) as well as a schedule for the morning session.

DRAFT

**Working Group on Welfare Reform, Family Support and Independence
California Public Forum
Sacramento City College Auditorium
Sacramento, California
Friday, October 8, 1993**

- 08:00 AM Meeting with State Legislators
Sacramento City College Auditorium
Room A-9
- 09:00 AM **FORUM BEGINS**
- 09:00 AM **Opening Remarks by Working Group Chairs**
- 09:10 AM - **Panel One - Overview of the GAIN Program**
09:40 AM John Wallace, MDRC
Bruce Wagstaff, Director, CA GAIN Program
Evelyn Parish
Emily Monge
- 09:45 AM - **Panel Two - Four: Lessons from the GAIN Program**
12:30 PM
- 09:45 AM - **Panel Two: Human Capital Development vs. Labor**
10:45 AM **Force Attachment**

Larry Townsend, Riverside County GAIN Program
Kathy Archuleta, Alameda County GAIN Program
Yvette Brown
GAIN Program Participant (Labor Force Attachment)
Connie Anderson, GAIN Program Coordinator, CA
Community Colleges
Russ Tershey, Center for Employment & Training
- 10:45 AM - **BREAK**
11:00 AM
- 11:00 AM - **Panel Three: The Role of Child Care**
11:40 PM

Patricia Siegel, CA Child Care Resource and
Referral Network
Sandy Zonnis, Child Care Resource Center
Kathleen O'Brien, Child Care Law Center
Jenny Hayward
Sherri Smith
Jill Berrick, UC Berkeley
- 11:45 PM - **Panel Four: Improving Participation**
12:30 PM

Patricia Knauss, LA County GAIN Program
Angela Blackwell, Urban Strategies Council
Casey McKeever, Western Center on Law and Poverty
John Robbins, SWIM Program

INVITED STATE LEGISLATORS FOR WORKING GROUP MEETING
October 8, 8:00 a.m.
Sacramento City College Auditorium, Classroom A-9

Staff representatives are in parentheses.

STATE SENATE

Senate Pro Tempore Dave Roberti (David Panush)
Majority Leader Mello
Minority Leader Kenneth Maddy (Stan Neal)
Senator Dianne Watson (Sarah McCarthy) - Chair, Health and Human Services Cmte.
Senator Mike Thompson - Chair, Budget Subcmte. (AFDC issues).
Senator Al Alquist - Chair, Budget and Fiscal Review Cmte.
Senator Leroy Green - Site visit in his district.
Senator Gary Hart - Chair, Education Committee. Leading advocate of child support enforcement. Recently carried legislation on food stamps and nutrition programs.
Senator Teresa Hughes - Chair, Select Cmte. on Teenage Pregnancy
Senator Pat Johnston - Chair, Industrial Relations Cmte.
Senator Tim Leslie - Carried Governor's welfare reform proposal.
Senator Bill Lockyer - Chair, Judiciary Cmte.
Senator Dan McCorquodale - Carried GAIN legislation.
Senator Nick Petris - Chair, Budget Subcmte. (education).
Senator Bob Presley - Chair, Appropriations Cmte.

STATE ASSEMBLY

Speaker Willie Brown (Patsy Kurakowa)
Minority Leader Jim Brulte (Nes Larson)
Assemblyman Tom Bates (Carol Wallisch)
Assemblywoman Marguerite Archie-Hudson - Member, Human Services Cmte.
Assemblywoman Valerie Brown - Member, Human Services Cmte.
Assemblyman John Burton - Site visit in his district.
Assemblyman Robert Campbell - Site visit in his district.
Assemblywoman Delaine Eastin - Former chair of GAIN Select Cmte.
Assemblywoman Barbara Friedman - Ways & Means Subcmte. Chair on Health and Human Services
Assemblywoman Barbara Lea - Site visit in district.
Assemblyman Richard Polanco - Leader on welfare and immigration. Chair of Hispanic Congressional Caucus.
Assemblyman Curt Pringle - Member, Human Services Cmte.
Assemblywoman Margaret Snyder - Member, Human Services Cmte.
Assemblyman Nao Takasugi - Member, Human Services Cmte.
Assemblyman John Vasconcellos - Chair, Ways & Means Cmte.

Friday, October 8

Public Forum

Afternoon Session

The afternoon session is set up as a more traditional public hearing. The session will begin with welcoming remarks from several elected officials including representatives of Governor Wilson, Speaker Brown, and Senate President Roberti. The Chancellor of the California Community College system David Mertes will also provide welcoming remarks.

Following the welcoming remarks will come the panel of representatives from organizations representing state and local elected officials. The schedule will provide a list of the exact representatives.

The afternoon session will continue with two traditional panels, one on Making Work Pay, and the other on Time Limits and Work Requirements. Speakers will each get three minutes and will then be able to take part in discussion with the Working Group.

The format changes at 4:00, however, when to accommodate the number of people wishing to testify, we are no longer providing an opportunity to continue to take part in discussion. Witnesses will line up at microphones and will simply have three minutes to present their testimony. There will be no follow up questions or discussion.

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**Working Group on Welfare Reform, Family Support and Independence
California Public Forum
Sacramento City College
Sacramento, California
Friday October 8, 1993**

12:30 PM - LUNCH
01:30 PM

01:30 PM - **Panel Five - California Elected Officials**
02:25 PM

Eloise Anderson for Gov. Pete Wilson
Ass. Tom Bates for Speaker Willie Brown and NCSL
State Sen. Mike Thompson for President Pro Tem
Roberti
Mayor Joseph Serna, Jr.
Chancellor David Mertes, California Community
Colleges
TBD for NGA
TBD for USCM
TBD for NLC
Supervisor Grantland Johnson for NACO
TBD for APWA

02:30 PM - **Panel Six - Making Work Pay**
03:10 PM

Valerie Pernel, Children Now

Robert Friedman, Corporation for Enterprise
Development

Jerry Fillingim, SEIU Local 535

James Shelby, Sacramento Urban League

Marc Brown, CA Rural Legal Assistance

03:15 PM - **Panel Seven - Time-Limited Transitional Support**
03:55 PM

Zenobia Embry-Nimmer, Fair Share Network

Elizabeth Toledo, CA NOW

Ethel Long Scott, Womens' Economic Agenda

04:00 PM - **Public Testimony**
05:00 PM

05:00 PM - **Closing Remarks by Working Group Chairs**
05:15 PM