



Temporary Assistance for Needy Families (TANF)
Welfare Transition (WT) Program
House Bill 1267 - Economic Self-Sufficiency

POLICY/DIRECTIVES

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 New Policy

 X **Policy Revision**

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Temporary Assistance for Needy Families (TANF)

Economic Self-Sufficiency

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Temporary Assistance for Needy Families (TANF)

Welfare Transition (WT) Program

Economic Self-Sufficiency

OF INTEREST TO

CareerSource staff in Okaloosa and Walton Counties who administer the Temporary Assistance for Needy Families (TANF) / Welfare Transition (WT) Program.

SUBJECT

Economic Self-Sufficiency

PURPOSE

This policy communicates CareerSource Okaloosa Walton's provision for the implementation and operations of House Bill 1267—Economic Self-Sufficiency. It is also intended to improve the outcomes for Welfare Transition (WT) customers.

REFERENCE

- House Bill 1267 - Economic Self-Sufficiency.
- Florida Statute 445.035, Diversion.
- Florida Statute 445.028, Transitional benefits and services.
- Florida Statute 445.0281, Transitional case management.
- Florida Statute 414.105, Time limitations of temporary cash assistance Family Self-Sufficiency.

Supersedes:	Date:
House Bill 1267 - Economic Self-Sufficiency (interim Policy)	November 25, 2024

BACKGROUND

Public assistance programs help low-income families meet their basic needs, such as housing, food, and utilities. The most utilized public assistance programs in Florida include Medicaid, the Supplemental Nutrition Assistance Program (SNAP) or food assistance, and the Temporary Assistance for Needy Families (TANF), and the Temporary Cash Assistance (TCA) program. In Florida, most of the participants in these programs are children. While the goal of public assistance programs is generally to ensure that a family's basic needs are met and facilitate economic advancement, families often exit programs before they can maintain self-sufficiency. A **benefit cliff** occurs when modest wage increases results in a net loss of income due to the reduction in or loss of public benefits that follows.

The **Career Ladder Identifier and Financial Forecaster (CLIFF) Dashboard** suite of tools is a set of resources developed by the Federal Reserve Bank of Atlanta to help individuals understand how career advancement impacts their financial situation, particularly in relation to public assistance benefits. The suite includes three main tools: (1) CLIFF Snapshot, (2) CLIFF Dashboard, and (3) CLIFF Planner.

The Florida CLIFF Dashboard is a key component of this suite, created through a partnership between CareerSource Florida and the Federal Reserve Bank of Atlanta. This tool visually demonstrates how potential earnings increases can affect public assistance benefits, helping working families make informed decisions about their career paths and financial futures. The dashboard is designed to support economic mobility and prosperity by providing a clear picture of the financial implications of career advancement.

The CLIFF Dashboard has been evaluated for its effectiveness and usability, with positive feedback from both clients and workforce staff. It serves as a valuable resource for those looking to navigate the complexities of career progression and financial planning.

POLICY GUIDANCE

A. HOUSE BILL 1267 - ECONOMIC SELF-SUFFICIENCY

1. The bill revises various components of the TANF and SNAP programs to facilitate economic advancement and self-sufficiency better. Specifically, the bill:
 - a. Creates transitional case management as a transitional benefit for TCA recipients who are determined ineligible for TCA for a reason other than noncompliance with work activity requirements.
 - b. Requires CareerSource Florida to use a tool to demonstrate the future financial impacts of changes to benefits and income over time.
 - c. Requires local workforce boards to administer, analyze, and use data from **intake** and **exit** surveys of TCA recipients.

- d. Requires the Department of Children and Families to expand mandatory SNAP Employment and Training participation to include adults ages 18-59 who do not have children under age 18 in the home or otherwise qualify for an exemption.
- e. Allow adults who have not attained a high school diploma (HSD) or its equivalent to satisfy their work requirements by participating in adult basic education or high school equivalency examination preparation for at least 20 hours per week.

Note: *If the state's TANF work participation rate, as provided by federal law, does not exceed the federal minimum work participation rate by 10 percentage points in any month, this requirement may be suspended by FloridaCommerce until the work participation rate exceeds the federal minimum work participation rate by 10 percentage points for at least three consecutive months.*

- f. Creates the School Readiness (SR) Plus Program, which provides a childcare subsidy for families deemed ineligible on redetermination for the SR program but with incomes between 85 and 100 percent of the state median wage.

B. DATA COLLECTION

1. **Under Florida Statute 445.035 - Data Collection and Reporting**, CareerSource Florida, Inc., in collaboration with the Florida Department of Commerce (FloridaCommerce), the Department of Children and Families, and the local workforce development boards, shall develop standardized **intake** and **exit surveys** for the purpose of collecting and aggregating data to monitor program effectiveness, inform program improvements, and allocate resources.
2. The local workforce development boards must administer the **intake survey** during the required diversion screening process under F.S. [445.017](#). The intake survey must be administered to each new recipient of temporary cash assistance under Chapter 414 who has not otherwise completed the survey.

3. INTAKE SURVEYS

- a. To ensure the requirements of the **intake survey** are met, the initial assessment completed by TCA applicants in the One-Stop Service Tracking (OSST) system has been amended to collect the required data elements.
- b. During the up-front diversion screening process for TCA applicants, CSOW staff must review the applicants' responses to the corresponding questions of the initial assessment for completeness. They must also discuss any incomplete or missing information with the applicant and make the appropriate updates in OSST.
- c. The intake survey must, at a minimum, collect qualitative or quantitative data, as applicable, relating to all of the following:
 - (1) The participants perceived individual barriers to employment.
 - (2) The reasons cited by the participant for his or her separation from employment in the previous 12 months.

- (3) The participants stated goals for employment or professional development.
- (4) The participant's highest level of education or credentials attained, or training received at the time of enrollment in the WT program.
- (5) The participant's awareness of welfare transition services.

4. **EXIT SURVEYS**

- a. An exit survey has been developed to collect required data elements.
- b. CSOW staff must administer the exit survey to participants at one of the following points of contact:
 - (1) During the hardship extension interview that is conducted when a participant is approaching the 48-month lifetime limit for TCA pursuant to section 414.105(10), F.S. and per [FloridaCommerce Final Guidance 025 – Welfare Transition Hardship Extension to Temporary Cash Assistance \(TCA\) Time Limits](#).
 - (2) When the participant is determined to be ineligible for TCA for a reason other than a work activity sanction and is contacted by the CSOW staff regarding the availability of transitional benefits and services, including voluntary case management required under House Bill 1267.
 - (3) When making oral (verbal) contact with participants who are subject to sanction pursuant to section 414.065(1), F.S.

Note: During the oral contact, CSOW staff must first counsel the participant regarding the consequences of noncompliance and, if appropriate, refer the participant to services that could assist the participant to fully comply with the WT program requirements. **If the participant indicates their unwillingness to comply with program requirements, CSOW staff must attempt to administer the exit survey at that time.**

- 5. The exit survey must, at a minimum, collect data relating to all of the following:
 - a. The participant's enrollment in other public benefits programs at the time of exit.
 - b. Whether the participant has a long-term career plan.
 - c. The participant's credentials, education, or training attained or received during enrollment in the WT program.
 - d. Barriers to the participant's employment that were addressed during enrollment in the WT program.
 - e. Any remaining barriers to the participant's employment.

6. SURVEY REPORTING REQUIREMENTS.

a. Under Florida Statute 445.035, Data Collection and Reporting:

- (1) The completed surveys must be submitted to CareerSource Florida, Inc., and anonymized data must be disseminated quarterly to FloridaCommerce and the Department of Children and Families.
- (2) FloridaCommerce, in consultation with CareerSource Florida, Inc., and the Department of Children and Families, must prepare and submit a report to the President of the Senate and the Speaker of the House of Representatives by January 1 each year. The report must include, at a minimum, the results of the **intake and exit surveys**, an analysis of the barriers to employment experienced by the survey respondents, and any recommendations for legislative and administrative changes to mitigate such barriers and improve the effective use of transitional benefits.

C. DIVERSION PROGRAM

1. Who should be screened?

- a. Before finding an applicant family eligible for up-front diversion services, CSOW staff must determine that all requirements of eligibility for diversion services would likely be met.
- b. CSOW staff must screen each family on a case-by-case basis for barriers to obtaining or retaining employment. The screening must identify barriers that, if corrected, may prevent the family from receiving temporary cash assistance on a regular basis. At the time of screening, the CSOW staff must administer the **intake survey** required under F.S. [445.035\(2\)](#).

D. TRANSITIONAL BENEFITS AND SERVICES

1. **Florida Statute 445.028, Transitional Benefits and Services.** In cooperation with FloridaCommerce, the Department of Children and Families must develop procedures to ensure that families leaving the temporary cash assistance program receive transitional benefits and services that will assist the family in moving toward self-sufficiency. At a minimum, the procedures must include, but are not limited to, the following:
 - a. Each recipient of cash assistance who is determined to be ineligible for cash assistance for a reason other than a work activity sanction must be contacted by the workforce system case manager and provided information about the availability of transitional benefits and services. Such contact must include the administration of the **exit survey** required under s. 445.035(2) and be attempted before closure of the case management file.
 - b. Each recipient of temporary cash assistance who is determined to be ineligible for cash assistance due to noncompliance with the work activity requirements must be contacted and provided information in accordance with F.S. 414.065(1). Contact must include the administration of the **exit survey** required under F.S. 445.035(2).

E. WORK ACTIVITY REQUIREMENTS FOR ADULTS WITHOUT AN HSD OR ITS EQUIVALENT

1. Currently, TANF work participation rate does not exceed the federal minimum work participation rate by ten percentage points. Therefore, at this time, adults who have not attained an HSD or its equivalent **may not** solely satisfy their work requirement by participating in an adult basic education or high school equivalency examination preparation for at least 20 hours per week. These participants are required to be assigned to the appropriate mix of core/core plus activities that meet their needs and align with their required amount of monthly participation hours.
2. FloridaCommerce will use **Measure 3 – Welfare Transition Federal All-Family Participation Rate** from the [Monthly Management Report](#) or a comparable report published by the Florida Department of Children and Families, to determine when the state's work participation rate exceeds the federal minimum work participation rate by 10 percentage points for at least three consecutive months. When this occurs, FloridaCommerce will notify the impacted participants and CSOW accordingly.

F. TRANSITIONAL CASE MANAGEMENT

1. **Under 445.0281 Transitional Case Management**, each recipient of cash assistance who is determined to be ineligible for cash assistance for a reason other than noncompliance with work activity requirements is eligible for voluntary case management services administered by CSOW. Case management services must be available to support families who transition to economic self-sufficiency and to mitigate dependency on cash assistance.
2. Case management services must include, but are not limited to:
 - a. Career planning.
 - b. Job search assistance.
 - c. Resume building.
 - d. Basic financial planning (using the Budget Planning Wizard in OSST for each program participant.
 - e. Connection to support services. And
 - f. Benefits management using a tool to demonstrate future financial impacts of the participant's change in income and benefits over time, as applicable.
3. Case managers must connect recipients to other transitional benefits as needed.

G. TOOL TO DEMONSTRATE FUTURE FINANCIAL IMPACTS

1. To ensure the requirements of using a tool to demonstrate future financial impacts of the participant's change in income and benefits over time are met, CSOW staff will use the **Career Ladder Identifier and Financial Forecaster (CLIFF)** tool suite administered by CareerSource

Florida, in accordance with [CareerSource Florida Strategic Policy 2023.06.07.A.5 – CLIFF Strategy](#).

2. CSOW staff must administer the appropriate information resource from the CLIFF tool suite at one of the following points of contact:
 - a. During the hardship extension interview that is conducted when a participant is approaching the 48-month lifetime limit for TCA, pursuant to section 414.105(10), F.S. and in accordance with [FloridaCommerce Final Guidance 025 – Welfare Transition Hardship Extension to Temporary Cash Assistance \(TCA\) Time Limits](#).
 - b. When the participant is determined to be ineligible for TCA for a reason other than a work activity sanction and is contacted by the CSOW regarding the availability of transitional benefits and services, including voluntary case management required under House Bill 1267.

H. CASE NOTES

Case notes should contain outcomes of conversations and other communication with participants concerning the surveys. They must be entered as soon as the information is obtained and/or when services are provided.

I. DOCUMENTATION

All services provided and case notes documenting the provision of services must be recorded in OSST and the ATLAS case file.

J. MONITORING

Elements of this policy will be monitored during the CSOW Quarterly Monitoring Program and, possibly, during CSOW Targeted Monitoring.

K. CONFIDENTIALITY

All data collected because of this policy is for official use only and should only be used in conducting official business.

L. SUGGESTIONS FOR CHANGES OR WAIVERS

Staff may submit a request for changes or waivers to this policy to CareerSource Okaloosa Walton, 109 8th Avenue, Shalimar, Florida 32579, ATTN: Executive Director or designee. A request may also be e-mailed to Policy@careersourceow.com.

- a. Request for changes must include the suggested change and an explanation of how the change will improve the process.
- b. Request for **waivers** must include names, effective dates, case notes relating to the waiver, dollar amounts, etc., as appropriate, and any other documentation to support the request.

M. ACTION REQUIRED

CareerSource staff in Okaloosa and Walton Counties who administer the Program identified in the section "Of Interest To" should implement this Local Operating Procedure upon receipt.

N. TRAINING HOURS: 1.0 hours.