

**STRATEGIC RECOMMENDATIONS FOR EXPANDING  
OPPORTUNITY AND REDUCING POVERTY IN OHIO**  
*The Ohio Anti-Poverty Task Force*

*This report was supported by a grant awarded to the Governor's Office of Faith-Based and Community Initiatives by the National Governors Association Center for Best Practices.*

## ABOUT THE TASK FORCE

On May 28, 2008, Governor Ted Strickland signed an executive order (2008-11S), which created the Ohio Anti-Poverty Task Force (Task Force) to develop practical shorter term and longer term strategic recommendations for the Administration to consider in its ongoing effort to reduce poverty in Ohio.

The Task Force was chaired by Greg Landsman, Director of the Governor's Office of Faith-Based and Community Initiatives. Thirty members were appointed to the Task Force including state agency representatives, faith-based and community non-profit leaders, Ohioans living in poverty, business and labor leaders, and key anti-poverty stakeholders from around the state.

Additionally, over three hundred Ohioans participated in the five work groups of the Task Force.

<b><u>Task Force Work Groups</u></b>
1) Working Poor (Households with Children, Households without Children, Kinship Care)
2) Children and Young Adults
3) Multiple Barriers to Employment (Formerly Incarcerated, Chronically Unemployed, Mental Health, Substance Abuse, Disability, Homeless, and Immigrant Communities)
4) Seniors
5) Benchmarks, Measures and Implementation

Thanks to the leadership of the Ohio Association of Community Action Agencies (OACAA) and the Ohio Community Action Agency network, over 1800 Ohioans, many of whom are low-income, participated in one of twenty-two Regional Conversations on Reducing Poverty. Their input informed and strengthened the Task Force's longer term recommendations.

The work of the Task Force was completed in two distinct phases. The first phase produced twenty-three shorter term recommendations that were submitted to the Governor on September 10, 2008. The second phase resulted in the series of longer term recommendations contained within this document and submitted to the Governor on April 28, 2009.

The National Governors Association (NGA) Center for Best Practices awarded a \$12,000 grant to the Governor's Office of Faith-Based and Community Initiatives to write the final report of the Task Force.

The Task Force would like to thank all those who helped inform and draft the recommendations included in this report.

# LETTER FROM THE TASK FORCE

April 28, 2009

Governor Strickland:

Thank you for your continued leadership on the issue of poverty and financial insecurity in Ohio.

We specifically want to recognize the investments being made to create new, good-paying jobs through the bipartisan Economic Stimulus Package and the American Recovery and Reinvestment Act, to expand healthcare coverage to hundreds of thousands of Ohioans, to increase access to and quality of early childhood development programs, to prevent additional foreclosures through the Save the Dream initiative, to make college more affordable, and to improve access to work supports through The Ohio Benefit Bank.

The Task Force was acutely aware of the important work described above, as well as the efforts already transpiring as part of the Education Reform Initiative, State (Healthcare) Coverage Initiative, Interagency Council on Homelessness and Affordable Housing, and Ohio's 21<sup>st</sup> Century Transportation Priorities Task Force. As such, the Task Force was compelled to focus its attention on affirming action currently being discussed and considered as well as new ideas that have proven effective in other parts of the country.

While we understand that, to a great extent, poverty rates correlate to unemployment rates and that your efforts to rebuild Ohio's economy in the aftermath of the current recession will go a long way toward lifting Ohioans out of poverty and expanding opportunities for all Ohioans, we believe the strategic recommendations contained in this report provide the most appropriate roadmap for state action to address poverty over the course of the next few years.

It is our hope that the longer term strategic recommendations provide your Administration and Ohio lawmakers with a clear sense of where Ohio must invest its energies and resources, if we are to dramatically reduce poverty in our great state.

In a tough economic climate, those living in poverty are often times the hardest hit. Paying for their basic needs becomes increasingly difficult with little to no savings to supplement monthly income. Additionally, the impact of the national recession has increased the number of Ohioans at risk of falling into poverty. We keep this in mind as we submit our longer term recommendations.

Sincerely,

The Ohio Anti-Poverty Task Force

# EXECUTIVE SUMMARY

The Task Force recognized that important work is already underway with respect to healthcare access, affordable housing, college access, education reform, early childhood development strategies, and transportation, and therefore focused its recommendations on new ideas that have proven effective in other parts of the country. At the same time, the Task Force affirms the action currently being considered by the Administration and the Ohio General Assembly.

These strategic recommendations focus first on aggressive and sustained efforts to create job opportunities for low-income Ohioans. The Task Force supports a more intentional commitment to ensure that public works initiatives provide jobs for low-income Ohioans, to expand transitional job programs in Ohio, to support social enterprises that put “hard-to-employ” populations to work, and to maximize the benefit of federal workforce development funds to provide training for low-income populations.

These strategies to create job opportunities for low-income Ohioans must be pursued with an emphasis on living wage jobs. A living wage must provide sufficient earnings to cover the costs of housing, food, and the other necessities of life. The Task Force recommends that wage goals be based, in part, on the Self-Sufficiency Standard, which measures how much income an individual or family of a certain composition, in a given place, needs to adequately meet basic needs—without public or private assistance.

In order for Ohioans to take advantage of educational and employment opportunities that can lead to sustainable financial progress, a foundational stability must be in place. Therefore, these longer term recommendations call for an ongoing commitment to ensure a reliable safety net for families and individuals facing financial hardship. Ohio is called upon to strengthen its efforts to ensure that families and children have access to the supports and benefits already in place and to pursue proven strategies to strengthen work incentives and rewards for low-income individuals as they attempt to move ahead through employment.

In an attempt to shift the paradigm of current anti-poverty work, these recommendations also encourage new attempts to draw on “informal” supports, such as family and youth mentoring, while expanding efforts to invest in children and young adults in a way that will help eliminate the painful reality of generational poverty.

Finally, these recommendations call on Ohio to be more accountable for the progress of its anti-poverty efforts, to measure investments in a uniform way, and to establish ongoing, interagency leadership.

Together, these recommendations establish a comprehensive and holistic four-pronged, multi-year approach for expanding opportunity and reducing poverty in Ohio:

- I. **Create Opportunities for Economic Advancement** - Encourage, enable, and support sustainable movement up the economic ladder for Ohioans living in poverty, as well as those who are at risk of falling into poverty, through training and employment opportunities.

- A. Strategy: Ensure Public Works Initiatives Provide Jobs for Low-Income Ohioans

Recommendations:

- A. Utilize public works resources to build skills and experience of entry-level and low-income workers.
- B. Encourage public works projects to hire low-income and entry-level workers.
- B. Strategy: Expand Transitional Jobs Programs

Recommendations:

- A. Expand Transitional Jobs programs through partnerships with state contractors.
- B. Establish a Transitional Workers Initiative to encourage and increase utilization of the Transitional Jobs model.
- C. Strategy: Expand Social Entrepreneurship

Recommendation:

- A. Establish a Social Entrepreneurship Initiative to serve as a clearinghouse for funding and central point of contact for technical support and training curriculum for the “hard-to-employ.”
- D. Strategy: Maximize the Benefit of Federal Workforce Development Funds to Provide Training for Low-Income Populations

Recommendations:

- A. Establish an interagency strategy for drawing down Food Stamp Employment and Training (FSET) funds.
- B. Implement policies and strategies to assure that the workforce development system is targeting resources to the needs of low-income Ohioans.
- C. Assist local workforce boards to address administrative barriers to effective use of WIA funds and implement innovations and best practices.
- E. Strategy: Foster and Expand Community Development Financial Institutions and Lending in Low-to-Moderate Income Communities

Recommendation:

- 1. Explore the possibilities of how Community Development Bank and Community Development Credit Union models could be adopted and implemented in various communities and conduct research on successful models in order to guide interested parties on how to adopt and implement a CDB/CDCU model.

F. Strategy: Expand the Accessibility and Use of Individual Development Accounts (IDAs) and Promote Financial Literacy Programs

Recommendation:

- A. Strengthen the savings ability of the working poor through collaboration with financial institutions.

II. **Establish Foundational Stability** - Provide for the basic needs of Ohioans living in poverty, as well as those who are at risk of falling into poverty, in order to prevent additional hardships, stabilize their current economic situation, and prepare them to take advantage of opportunities that lead to economic advancement.

A. Strategy: Strengthen the “Safety Net” and Maximize Support Packages for Ohioans

Recommendations:

- A. Strengthen state investments in housing, healthcare, mental health and addiction services, and food assistance.
  - B. Strengthen federal advocacy for housing, food assistance, and work-related tax credits.
  - C. Streamline and simplify the process for accessing work supports and other benefits.
  - D. Coordinate outreach across relevant state agencies and establish data sharing policies to increase access to work supports and public benefits.
  - E. Establish a statewide 2-1-1 information and referral system.
  - F. Improve access to needed supports for seniors and disabled Ohioans.
  - G. Utilize the Ohio Family Resource Simulator.
  - H. Endorse and expand Ohio’s 21<sup>st</sup> Century Transportation Priorities Task Force’s recommendations to improve transportation coordination.
  - I. Protect families in crisis and ensure they have access to basic utilities including gas, electric, water, and telephone service.
- B. Strategy: Strengthen Ohio Work Incentives and Rewards

Recommendations:

- A. Establish steps to eliminate the “Cliff Effect.”
- B. Establish a state Earned Income Tax Credit (EITC).

C. Establish a refundable Child and Dependent Care Tax Credit in Ohio.

D. Increase Support for Volunteer Tax Preparation Programs.

E. Reform tax refund anticipation loans (RALs) in Ohio.

C. Strategy: Expand the Use of Informal Supports

Recommendations:

A. Expand the Circles™ Campaign in Ohio.

B. Expand youth mentoring in Ohio.

III. **Invest in Children and Young Adults** - Further invest in children and young adults in an effort to reverse the tide of generational poverty.

Strategies:

A. Pursue strategies to keep children in school.

B. Expand efforts to reduce teen pregnancy.

C. Strengthen after school and summer programs for children.

D. Increase participation in child nutrition programs.

E. Increase access to high quality early childhood development programs and family supports for children 0-6.

F. Establish tax incentives to attract and retain high-quality teachers and other school staff.

IV. **Ensure Transparency, Accountability, and Leadership** - Ensure progress is accountable, investments are uniformly measured, information is made public, and ongoing interagency leadership is effective.

Strategies:

A. Establish Ongoing Interagency Leadership in Implementation

B. Track Progress Using Key Indicators

C. Establish a Universal System for Measuring State Investments

D. Launch Tracking Web Site and Require Annual Report on Progress

It is not the expectation of this Task Force that the recommendations submitted to the Governor be implemented immediately. Rather, these strategic recommendations are intended to be multi-year in scope and require a sustained commitment over several budget cycles in order to implement them in their entirety and realize optimal results and return on investment.

## **(I) CREATE OPPORTUNITIES FOR ECONOMIC ADVANCEMENT**

*These strategies focus on aggressive and sustained efforts to create job opportunities for low-income Ohioans through ensuring that public works initiatives provide jobs for low-income Ohioans, expanding transitional job programs in Ohio, supporting social enterprises that put “hard-to-employ” populations to work, and maximizing the benefit of federal workforce development funds to provide training for low-income populations.*

*These strategies to create job opportunities for low-income Ohioans must be pursued with an emphasis on living wage jobs. A living wage must provide sufficient earnings to cover the costs of housing, food, and the other necessities of life. The Task Force recommends that wage goals be based, in part, on the Self-Sufficiency Standard, which measures how much income a family of a certain composition, in a given place, needs to adequately meet basic needs—without public or private assistance.*

Information regarding the Self-Sufficiency Standard can be found in the *Self-Sufficiency Standard for Ohio 2008* report, commissioned by the Ohio Association of Community Action Agencies (OACAA) and written by Diana Pearce and in *The Real Bottom Line, The State of Poverty in Ohio 2008: New Obstacles and Opportunities for Low Income Ohioans*, a report prepared for OACAA by Community Research Partners (CRP).

### **(A) Strategy: Ensure Public Works Initiatives Provide Jobs for Low-Income Ohioans**

Providing opportunities for work to low-income Ohioans is critical to reducing their immediate hardships and could lead to long-term self-sufficiency. Jobs need to provide family-sustaining wages and benefits, on-the-job training, and opportunities for career advancement in in-demand occupations and industries. To ensure low-income Ohioans have access to public works jobs that pay a living wage, the Task Force recommends the following strategies.

#### **Recommendation 1: Utilize public works resources to build skills and experience of entry-level and low-income workers:**

- Give preference to public works projects that use a portion of public works resources to support on-the-job training of workers.
- Target the use of workforce development resources to prepare low-income and unemployed adults to move into public works jobs that pay family-sustaining wages and lead to career advancement.

- Provide participants-in-training with adequate work stipends and supportive services, such as child care.
- Expand pre-apprenticeship skills enhancement programs for populations historically underrepresented in the building trades.

**Recommendation 2: Encourage public works projects to hire low-income and entry-level workers:**

- Give preference to projects that establish community benefit agreements ensuring that low-income individuals are hired and complete a defined number of work hours on the project.
- Give preference to projects that make use of apprentices.
- Expand public works apprentice programs.
- Support the use of transitional jobs for certain public works programs to provide short-term, subsidized work for low-income Ohioans facing multiple barriers to employment.

## **(B) Strategy: Expand Transitional Jobs Programs**

There is a growing Ohio population that remains disconnected from the world of work and faces multiple barriers to employment. This population, often referred to as “hard-to-employ,” includes a variety of individuals, such as:

- Individuals lacking a high school diploma or GED
- Formerly incarcerated individuals
- Ohio Works First (OWF) families who have exhausted their 36-month eligibility
- Individuals with disabilities
- Individuals aging out of the foster care system
- Homeless Ohioans
- Veterans
- Rural dislocated workers
- Individuals with mental health challenges
- Individuals with substance abuse challenges

To expand transitional job opportunities to formerly incarcerated youth and adults, the Task Force recommends that efforts be made to eliminate “collateral sanctions,” or those Ohio laws that prevent formerly incarcerated Ohioans from obtaining unsubsidized, stable employment.

Transitional Jobs (TJ) is a workforce strategy that helps participants overcome multiple barriers to employment through the use of time-limited, wage-paying jobs that combine real work, skill development, and supportive services. The transitional jobs strategy pragmatically addresses the complex reasons for a person’s unemployment and starts with the desired outcome--employment.

While the person is working and earning an income, case-managed social services are brought to bear on the individualized nature of the factors that blocked the person's success in employment in the past. Job development services facilitate placement in unsubsidized work, and job retention services help consolidate a successful transition to long-term employment.

As Ohio pursues transitional job strategies, it must do so with a focus on establishing paths to permanent job opportunities for low-income Ohioans.

**Recommendation 1: Expand Transitional Jobs programs through partnerships with state contractors:**

- Establish incentives for state contractors to provide Transitional Jobs as an employment and training option within all public contracts.
- Include Transitional Jobs as a strategy in new and existing employment and training efforts by providing bonus points for contractors/programs that include Transitional Jobs.
- Encourage and give preference to contractors that utilize the Federal Bonding Program, which encourages the utilization of existing tools for the employment of formerly incarcerated Ohioans. The U.S. Department of Labor established the Federal Bonding Program to enable the delivery of bonding services as a unique job placement tool to assist ex-offenders, and other at-risk/hard-to-place job applicants. In Ohio, the program is administered by the Ohio Department of Rehabilitation and Correction and is available at no cost to the job seeker or employer.

**Recommendation 2: Establish a Transitional Workers Initiative to encourage and increase utilization of the Transitional Jobs model.** This initiative would:

- Lead an interagency effort to better coordinate and align Transitional Jobs with all public workforce, training, and education efforts.
- Partner with the National Transitional Jobs Network to provide technical assistance and capacity building to regions in the implementation of various Transitional Jobs strategies.
- Develop and promote appropriate hiring incentives for local employers to participate in the Transitional Jobs program.
- Research and evaluate the effectiveness of Transitional Jobs program.
- Lead an effort to eliminate "collateral sanctions," or Ohio laws that prevent formerly incarcerated Ohioans from obtaining unsubsidized, stable employment.
- Ensure that community voicemail initiatives are readily available across the state so that homeless persons can communicate with potential employers.
- Better promote the Work Opportunities Tax Credit (WOTC), which provides Ohio employers with a tax credit against their federal tax liability for hiring individuals from

target groups of disadvantaged job seekers. To do so, the Task Force recommends Ohio work closely with the Ohio Chamber of Commerce, local chambers of commerce, the National Federation of Independent Business (NFIB), the Ohio Manufacturers' Association (OMA), the Ohio Business Roundtable, Inc., and others.

## **(C) Strategy: Expand Social Entrepreneurship**

Social entrepreneurship is often a “low-profit” venture developed in response to a social problem and pursued using entrepreneurial principles that can involve producing market value, earning revenue, and employing the chronically underemployed.

The Task Force recommends implementing new strategies aimed at encouraging and assisting non-profit organizations and other socially-minded ventures to establish sustainable and effective social enterprises, especially those agencies that work with the chronically unemployed, formerly incarcerated, and individuals with mental illness and disabilities.

**Recommendation 1: Establish a Social Entrepreneurship Initiative to serve as a clearinghouse for funding and central point of contact for technical support and training curriculum for the “hard-to-employ.”** This initiative would:

- Provide seed funds to support social entrepreneurship initiatives in the start-up phase of their development.
- Develop new loan products, micro-lending and revolving loan efforts, tax credits, grant programs, and other incentives for socially-minded small businesses.
- Offer training courses on starting and sustaining socially-minded small business ventures and free comprehensive startup toolkits for new efforts.
- Coordinate investment strategies at relevant state agencies around innovative and proven social entrepreneurship initiatives.
- Provide funding for social impact studies on the benefit of social enterprise in Ohio.
- Expand the state’s small business hotline to include information for socially-minded small business ventures.
- Create an annual recognition for developing the most innovative, sustainable, and effective solution to addressing need.
- Identify necessary and appropriate changes to the tax status of non-profit and for-profit entities pursuing socially minded ventures.
- Highlight existing social entrepreneurship initiatives and disseminate best practice information.

- Investigate the feasibility of a statewide collaborative of financial institutions willing to pool Community Reinvestment Act (CRA) funds and resources to invest in socially minded small business ventures throughout Ohio.

The Task Force recommends housing this effort in the Ohio Department of Development, Division of Small Business and Entrepreneurship.

## **(D) Strategy: Maximize the Benefit of Federal Workforce Development Funds to Provide Training for Low-Income Populations**

Federal workforce development and training funds that are disbursed to the State of Ohio from various federal agencies, including, but not limited to the U.S. Department of Labor, U.S. Department of Agriculture, and U.S. Department of Health and Human Services, could be further aligned to allow Ohio to leverage all available funds and to assure that they are used to increase the training and skills of low-income Ohioans for in-demand occupations.

### **Recommendation 1: Establish an interagency strategy for drawing down Food Stamp Employment and Training (FSET) funds.**

Assure that Ohio is accessing all available FSET funds for job training services for food stamp recipients. Implement an Ohio initiative, similar to the State of Washington model, which enables third-party workforce development providers to leverage their own resources to meet non-Federal match requirements to draw down FSET 50-50 Match dollars.

### **Recommendation 2: Implement policies and strategies to assure that the workforce development system is targeting resources to the needs of low-income Ohioans.**

Implement reforms to the workforce development system to shift from the traditional focus on job search activities to job training activities needed to retrain workers in the rapidly changing economy and to increase the focus on services for low-income, low-skilled populations. The Task Force recommends that Workforce Investment Act (WIA) funds be primarily used to fund training, defined to include: a) occupational training at an adult career center, community college, branch campus, or other WIA-eligible training providers; b) basic literacy, adult education, and ESL classes; and c) supportive services or needs-related payments for individuals participating in a WIA eligible training program to assist with meeting living expenses.

### **Recommendation 3: Assist local workforce boards to address administrative barriers to effective use of WIA funds and implement innovations and best practices.**

Provide training, technical assistance, and administrative resources to local areas to support them in overcoming administrative barriers to implementing policies to serve low-income participants. This includes guidance and assistance with adequate staffing levels, administrative time tracking, maximizing expenditure rates, contracting, and performance measurement. Also, provide training for local workforce boards, county agencies, and their collaborators in models, innovations, and best practices in WIA policies and programs from across the state and nation.

## **(E) Strategy: Foster and Expand Community Development Financial Institutions and Lending in Low-to-Moderate Income Communities**

Low-to-moderate income communities need the ability to access credit and build assets in a secure financial environment. Below are financial challenges they may face:

- Payment systems for check cashing, credit cards, and debit cards
- Affordable credit for mortgages, installment debt, and education expenses
- Commercial bank services for loans and payroll
- Secure deposits for savings and transaction balances
- Asset management advice for households.

**Recommendation 1: Explore the possibilities of how Community Development Bank and Community Development Credit Union models could be adopted and implemented in various communities and conduct research on successful models in order to guide interested parties on how to adopt and implement a CDB/CDCU model.**

Community Development Financial Institutions (CDFIs) in low-to-moderate income communities need to be explored at a statewide level.

## **(F) Strategy: Expand the Accessibility and Use of Individual Development Accounts and Promote Financial Literacy Programs**

Working individuals and families have limited resources to use for savings. Ohio must strive to move families and individuals forward in the economy through the creation of financial assets.

**Recommendation 1: Strengthen the savings ability of the working poor through collaboration with financial institutions:**

- Work with city mayors and county commissioners on an effort to connect unbanked households to financial institutions.
- Request that financial institutions open savings accounts regardless of CheckSystems violations.
- Develop a pay check card product that would enable tax refunds and pay checks to be directly deposited.

- Request that financial institutions develop, market, or expand IDA programs for consumers.
- Advocate for changes to federal IDA law to allow for limited withdrawals from IDA funds for emergencies, such as an eviction notices or car repairs.
- Include financial literacy in all K-12 curricula in every school in Ohio.
- Connect tax preparation services to the new SaveNOW program recently established by Ohio Treasurer Kevin L. Boyce. SaveNOW provides Ohioans with a 3.25% interest bonus in their savings account.

## **(II) ESTABLISH FOUNDATIONAL STABILITY**

*In order for Ohioans to take advantage of educational and employment opportunities that can lead to sustainable financial progress, a foundational stability must be in place. These strategies call for an ongoing commitment to ensure a reliable safety net for families and individuals facing financial hardship. They call upon Ohio to strengthen its efforts to ensure that families and children have access to the supports and benefits already in place. In addition, the recommendations call for the pursuit of proven strategies to strengthen work incentives and rewards for low-income families and individuals as they attempt to move ahead through employment.*

### **(A) Strategy: Strengthen the “Safety Net” and Maximize Support Packages for Ohioans**

Ohio must continue to invest in basic needs such as food assistance, mental health services, housing support, and child care. However, more must be done to advocate for additional federal investments, particularly in the area of affordable housing.

The state must strive to be the nation’s leader in effectively leveraging a broad array of supports and benefits available from the federal government by maximizing work supports and tax credits that boost family incomes and local economies. For example, The Ohio Benefit Bank, a public-private partnership between the Governor’s Office of Faith-Based and Community Initiatives, the Ohio Association of Second Harvest Foodbanks, and more than 800 community and faith-based organizations, connects low-to-moderate income Ohioans to work supports and tax credits. The OBB has become a national model and has helped nearly 70,000 Ohioans access more than \$100 million in potential supports and tax credits. Ohio must expand efforts to maximize federal and state work supports and tax credits.

The Task Force has outlined recommendations to strengthen the “safety net” and maximize federal and state work supports and tax credits.

**Recommendation 1: Strengthen state investments in housing, healthcare, mental health and addiction services, and food assistance.**

- Lift the cap on the Housing Trust Fund, which is currently unable to meet demands.
- Implement the healthcare reform recommendations outlined in the State’s Coverage Initiative so that every Ohioan has access to quality and affordable healthcare.
- Strengthen investments in mental health and addictive services.
- Expand the Ohio Food and Agricultural Clearance Program to \$17 million per year from the current \$8.5 million to provide wholesome, Ohio grown, fruits, vegetables, protein, and dairy items to Ohioans with incomes at or below 200% of the federal poverty level.
- Allow those eligible to utilize the full sixty months of Ohio Works First benefits by expanding uninterrupted services from three years to five years in accordance with federal Temporary Aid to Needy Families (TANF) regulations.

**Recommendation 2: Strengthen federal advocacy for housing, food assistance, and work related tax credits.** Advocate for:

- Additional investments in federal housing programs, as they have not kept up with the cost of housing.
- A permanent increase in the monthly food assistance allotment.
- A permanent increase in the Earned Income Tax Credit.
- Significantly increase the Work Opportunity Tax Credit and make that tax credit refundable for employers who hire “hard-to-employ” individuals.

**Recommendation 3: Streamline and simplify the process for accessing work supports and other benefits.**

Ohio has made progress streamlining and simplifying the various application processes with the expansion of categorical eligibility for food stamps and the electronic submission of applications for cash assistance, food assistance, and Medicaid programs through The Ohio Benefit Bank.

Through a grant from the Living Cities Foundation, the Governor’s Office of Faith-Based and Community Initiatives is exploring all other options to reduce barriers and increase access to work supports and benefits by examining eligibility requirements, verification processes, renewal procedures, and program applications.

As it relates to this project, the Task Force recommends that Ohio:

- Pursue a “technology-based” approach utilizing web/electronic submission and telephone interview options for work supports and benefits to homebound seniors, rural, and low-income Ohioans with transportation and child care constraints.
- Implement CRIS-E universal profile and other workforce modernization plans that would allow caseloads to be shared across work teams and potentially statewide.

- Align recertification periods for all work supports to 12 months and allow telephone or electronic recertification. Moving recertification for food assistance to a twelve-month cycle can significantly decrease administrative costs and reduce the amount of “churning” on and off the program.
- Create a single, simplified, and efficient process for low-income disabled Ohioans to access Medicaid and Social Security (SSI/SSDI) benefits. Eliminate duplicative steps, forms, and the number of entities currently involved in the process.
- Establish presumptive eligibility, self-declaration, and administrative verification of income for Medicaid for children. This change would likely result in an additional 2,000 - 4,000 children accessing health coverage in Ohio.

**Recommendation 4: Coordinate outreach across relevant state agencies and establish data sharing policies to increase access to work supports and public benefits.**

Individuals currently enrolled in one program area are likely eligible for other supports. Better utilizing collected data to pursue targeted outreach strategies can help to identify currently underserved populations.

- Enable the appropriate and legal exchange of client-specific and/or aggregate electronic data between state agencies to allow for the collaborative sharing of mutual client data for a more efficient and effective delivery of services to increase access to work supports and public benefits.
- Establish a more integrated intake procedure such as a universal application and a bridging application connecting various state databases.

**Recommendation 5: Establish a statewide 2-1-1 information and referral system.**

Establish a 2-1-1 statewide database and expand 2-1-1 to all Ohio counties. Currently, there are nineteen independently operating 2-1-1 systems in Ohio – and 25% of Ohioans do not have 2-1-1 access. Establishing a 2-1-1 statewide database and expanding 2-1-1 to all Ohio counties will make it possible for all Ohioans to access the programs and services they need. Continue to invest in a 2-1-1 statewide database – and require relevant state agencies to leverage the data as part of their ongoing work.

**Recommendation 6: Improve access to needed supports for seniors and disabled Ohioans**

In addition to establishing a single, simplified, and efficient process for low-income disabled Ohioans to access Medicaid and Social Security (SSI/SSDI) benefits, the Task Force also recommends the following as it relates to seniors and disabled Ohioans:

- Create a consistent message on Estate Recovery and pre-planning long-term care needs to help both those accessing Medicaid and those who are not yet in need of services to understand their options and make informed decisions. There is potential to work through the Ohio Department of Aging and organizations serving persons with

disabilities to reach out through the aging and disability networks, service providers, and caregivers with this message.

- Train Senior Community Service and Employment Program workers as Ohio Benefit Bank counselors so they can better assist seniors and others in completing and submitting applications for the supportive programs for which they are eligible.
- Launch a broader awareness campaign for the Medicaid Buy-In for Workers with Disabilities. The program is less than a year old in Ohio with close to 2,000 people already participating. A larger, more intentional strategy will be required.

### **Recommendation 7: Utilize the Ohio Family Resource Simulator.**

The Family Resource Simulator was recently developed for Ohio by the National Center for Children in Poverty (NCCP). Using Ohio specific law and policy, this simulator illustrates the impact of work supports, such as earned income tax credits, child care assistance, food assistance, and Medicaid on the budget of a hypothetical low-income working family.

The simulator will inform policymakers of possible ways to avoid the “cliff effect” that many working families face, when an increase in earned income—even by a few dollars a week—leads to a loss of coverage and support. For example, a small hourly wage increase of \$1.00 could mean the loss of work supports, such as child care and medical coverage, that keep the parent employed.

The Task Force recommends that the Governor’s Office host a briefing with lawmakers, administration officials, and other key stakeholders around the Ohio Family Resource Simulator. NCCP is prepared to present on the relevant learning associated with their work.

### **Recommendation 8: Endorse and expand Ohio’s 21<sup>st</sup> Century Transportation Priorities Task Force’s recommendations to improve transportation coordination.**

Ohio could better coordinate transportation services for all Ohioans, including those who are transit dependent, senior citizens, people with disabilities, veterans, and individuals with special health and human service needs, as well as citizens with limited incomes. Better coordination of efforts would improve the productivity of public transportation and reduce costs for Ohio taxpayers and the agencies involved.

The Task Force supports the following recommendations developed by Ohio’s 21<sup>st</sup> Century Transportation Priorities Task Force to:

- Establish a Health and Human Service Transportation Plan to ensure that health and human services options are coordinated and addressed.
- Streamline state rules and regulations regarding the provision of service delivery and lobby for federal changes where barriers are identified so that funds can flow quickly to providers.

- Consider establishing an Executive Office for Mobility Management (similar to Executive Medicaid Management Administration), for the coordination of transportation across systems, which would report to the Governor.
- Create a comprehensive inventory of service providers and a comprehensive online service directory.
- Invest in Intelligent Transportation Systems to create a single point of access to transportation services.

In addition to these recommendations, the Task Force also recommends:

- Utilizing federal Corporation for National and Community Services programs (e.g., VISTA, AmeriCorps, and Senior Corps) to increase the number of volunteers supporting human services transportation.
- Replicating Ohio’s New Freedom initiative programs that have proven successful in developing a base of community volunteers (e.g., church groups) who could assist with transportation when needed.
- Creating reimbursement systems, including Medicaid, that encourage group trips and ride sharing (instead of one-at-a-time, taxi style service) whenever feasible. The goal would be a measurable increase in the number of passenger trips per vehicle mile, as well as increased access to services for consumers regardless of payer.

**Recommendation 9: Protect families in crisis and ensure they have access to basic utilities including gas, electric, water, and telephone service.**

To protect the health and safety of individuals and families, encourage utility companies to establish flexibility in terms of negotiating individual payments to avoid disconnection of service by extending payment plans and terms as long as necessary to allow customers to bring payments current. In addition, utility companies should ensure steps are taken to avoid shut-offs, especially in the hottest and coldest seasons. These steps will also protect citizens who have chronic health issues or who rely on utilities to maintain operation of life support equipment from disconnection of utility service.

**(B) Strategy: Strengthen Ohio Work Incentives and Rewards**

Pursue proven strategies to further strengthen work incentives and rewards for low-income populations as a way of strengthening families and reducing poverty.

**Recommendation 1: Establish steps to eliminate the “Cliff Effect.”**

Utilize the Ohio Family Resource Simulator to better understand the way in which Ohio’s eligibility policies affect working families as they experience incremental increases in earned income. Pursue strategies to minimize the “cliff effect,” putting in its place a more gradual “step

down” approach to work supports and benefits. This “cliff effect” arises when a family’s income rises with higher earnings, but drops off sharply when even a small increase leads to a loss of benefits, such as children's health insurance coverage, home energy assistance, or eligibility for a low-income tax credit.

**Recommendation 2: Establish a state Earned Income Tax Credit.**

Create a refundable state Earned Income Tax Credit (EITC) based on 5% of the federal EITC. Enacting a state EITC would help working families with children. State EITCs bring additional money into the community and have increased the number of people filing for and receiving the federal EITC.

Based on 2005 data, nearly 800,000 low-to-moderate income families stand to gain needed income support through a refundable state EITC. Providing a state EITC would be a targeted way of providing vital additional resources to low-income working families, primarily those with children.

**Recommendation 3: Establish a refundable Child and Dependent Care Tax Credit in Ohio.**

Modify its current Child and Dependent Care tax credit, which is nonrefundable, to make it refundable to low- to-moderate income families. Covered services include any child-care setting used while a parent is at work or looking for work. By making the current Child and Dependent Care tax credit refundable, Ohio would make the credit available to those lowest-wage workers with no income tax liability.

**Recommendation 4: Increase Support for Volunteer Tax Preparation Programs**

Increase support and awareness of free volunteer tax preparation services, such as those provided by The Ohio Benefit Bank and Volunteer Income Tax Assistance (VITA) sites. This support will help low-to-moderate income families and individuals get free tax preparation assistance.

Only a small percentage of eligible low-income families use free tax preparation services (less than 2% of EITC recipients). More assistance in the form of advertising, staff, and training would greatly benefit the free filing effort.

**Recommendation 5: Reform tax refund anticipation loans (RALs) in Ohio**

Address the issue of tax refund anticipation loans (RALs), which are high-interest loans sold to taxpayers based on their expected tax return. A majority of RALs are sold to Earned Income Tax Credit (EITC) recipients, diluting the expected return aimed at helping the working poor care for their children and afford basic needs. There were roughly 800,000 EITC returns in Ohio in filing year 2006, and more than 386,000 RALs (including refund loan checks) sold. The Task Force recommends that Ohio:

- Require all businesses engaging in tax preparation and selling tax refund loans to register with the state and require a database to keep track of loans made and terms of loans, including fees.

- Mandate that only businesses where tax preparation is the primary business can sell RALs. This curtails businesses such as auto car dealerships and other businesses who often sell RALs with other products that can confuse customers.
- Limit the interest rate associated with RALs similar to recently passed “Payday Lending” legislation.
- Connect tax preparation services to strategies that incentivize savings, such as the new SaveNOW program recently established by Ohio Treasurer Kevin L. Boyce. SaveNOW provides Ohioans with a 3.25% interest bonus in their savings account.

## **(C) Strategy: Expand the Use of Informal Supports**

Place a greater emphasis on the role community plays in helping to establish foundational stability for low-income Ohioans.

### **Recommendation 1: Expand the Circles™ Campaign in Ohio.**

The Circles™ Campaign is a new initiative already working in forty communities in eighteen states that will engage communities to join with 1,000 low-income families to find paths out of poverty and address the systems and policies that keep poverty in place. Move the Mountain Leadership Center (MTM) is the national non-profit organization helping expand and develop Circles™ initiatives in several Ohio communities. MTM is committed to helping Circles™ families achieve an earned income sufficient to meet their basic household needs regularly without cash assistance, food assistance, or housing subsidy.

Each Circle consists of a family working to move out of poverty and from two-to-four middle-class Allies, who befriend the family and support its members throughout the transition into self-sufficiency. With the help of these Allies, each family sets goals that are unique to its own needs and circumstances and that will lead to developing the emotional, financial, intellectual, and spiritual resources necessary for self-sufficiency and family stability.

Ohio can be a national leader by investing in the expansion of initiatives that leverage informal supports such, as Circles™. However, Ohio should begin with several pilot programs to ensure the efficacy of these efforts in all regions and communities of the state.

### **Recommendation 2: Expand youth mentoring in Ohio.**

For many young people living in poverty, developing a “future story” becomes paramount to advancing beyond the confines of their current circumstance. Through effective mentoring programs, at-risk youth are matched with an adult mentor in a way designed to help them envision that “future story,” which often leads to improved academic performance, strengthened social relationships, and personal development.

Mentoring uses relationships to impart changes in attitudes and behaviors. Ohio could become the “Mentoring State” with a more intentional and committed approach both at the state and local school district level.

## **(III) INVEST IN CHILDREN AND YOUNG ADULTS**

*The Task Force affirms the current investments being made in the area of early childhood development and supports the ongoing commitment to the Governor's Early Childhood Cabinet and its many initiatives. The Task Force is also encouraged by the Governor's Education Reform plan, particularly the commitment to community engagement strategies, longer school years, full-day kindergarten, and establishing 21<sup>st</sup> century learning environments for Ohio's children. However, the Task Force recommends that additional steps be considered to further invest in children and young adults in an effort to reverse the tide of generational poverty.*

### **(A) Pursue Strategies to Keep Children in School**

Many Ohio children face multiple barriers that prevent them from remaining in school, including unstable family situations, school policies, and inadequate services for mental health and behavior issues. Because children in low-income families often do not have resources to access quality alternative education facilities, these children are at risk of not finishing school, becoming the perpetrators and victims of crime, becoming teen parents, and other factors that perpetuate the cycle of poverty.

Children who are members of some special populations, including homeless and foster youth, are particularly at risk of falling victim to this cycle, because they lack family support and stability.

Ohio can address the issue of keeping children in school from a holistic perspective and with a focus on the dignity of each child. Increasing the number of Ohio children who finish school is one of the most effective ways to reduce poverty over the long-term.

The Task Force recommends that Ohio:

- Pursue legislation requiring schools to embrace positive behavior interventions strategies. Ohio law currently requires school districts to “adopt a policy of zero tolerance for violent, disruptive, or inappropriate behavior...” (O.R.C. § 3313.534). The Task Force recommends amending this law to include a requirement that school districts promulgate policies to implement positive behavior interventions and supports (PBIS) in schools, so that students whose behavior is a barrier to their success in school are identified early and can be treated and/or properly taught how to control their behavior.
- Work with the Ohio Department of Education (ODE) and the Ohio Board of Regents (OBR), offer training and support to school districts in implementing PBIS in schools and to include in this effort pre-service training for the colleges and universities that train teachers. ODE is in a unique position to offer support and training for school districts on how to more effectively address students' problem behavior.
- Work with local school districts in the appropriate use of police in schools. There is currently a discrepancy in what triggers police contact for students. It is crucial that Ohio

schools act in a consistent, careful, and restrained way in choosing to call the police to enter a school building to address student behavior.

- Create a statewide pilot project modeled after the *Kids in School Rule!* program in Cincinnati to ensure seamless support among systems so that all children in Ohio successfully complete school. The Hamilton County Juvenile Court, the Hamilton County Department of Job and Family Services, ProKids, Cincinnati Public Schools, and Legal Aid Society of Cincinnati cooperate to provide seamless support that helps foster children remain in and successfully complete school. *The Kids in School Rule!* program addresses inconsistency by providing a system for entities involved in the child's life to communicate with each other to ensure that the child receives help and support.
- Provide grants and incentives to schools to implement peace programs, community-based responses to violence, and other methods of addressing behavior and misconduct concerns in schools without involving the criminal justice system.

## **(B) Expand Efforts to Reduce Teen Pregnancy**

The birth rate for Ohio teenagers fifteen-to-nineteen years of age increased 3% in 2006, interrupting the fourteen-year period of continuous decline from 1991 through 2005.

The Task Force recommends that, to help reduce teen pregnancy in the state:

- Enact legislation to direct the Ohio Department of Education to establish state standards for a health education curriculum that includes abstinence-inclusive, medically accurate, comprehensive reproductive health education.
- Support enactment of key provisions of the Ohio Prevention First Act, particularly those provisions that would: (1) limit state funding to only those reproductive health education programs that provide comprehensive, medically accurate, evidence-based information, and (2) launch a Teen Pregnancy Prevention grant program through the Ohio Department of Health to award grants to public and private entities to establish or expand programs geared towards at-risk youth.
- Continue ongoing research by the Ohio Department of Health that would annually analyze state-level teen birth rate data.

## **(C) Strengthen After School and Summer Programs for Children**

Children who participate in after school programs are more likely to be engaged in the education process, have better grades and attendance, show more positive social skills, and have higher aspirations for college. The Task Force recommends that Ohio:

- Increase funding for after school and summer programs to allow greater access for working families.

- Coordinate current after school and summer program licensure requirements with school requirements so that more schools are eligible to host after school programs. A work group comprised of members of the Ohio Department of Education and the Ohio Department of Job and Family Services has already been established as part of a Mott Family Foundation grant.
- Increase flexibility in the use of childcare vouchers for out-of-school time programs to pay a standard weekly rate instead of the current hourly rate. Currently, the vouchers for school aged children only pay for the hours the child is in attendance at the program, while early childhood vouchers pay a part-time or full-time rate.
- Increase co-op opportunities for high school-aged youth so they can learn about business and industry needs and be prepared to enter college, job training, or the workforce. When high school-aged youth see the end result of education (working in the “real world”) they will be more invested in their studies and make the school-workplace connection.

## **(D) Increase Participation in Child Nutrition Programs**

Increase participation and place greater emphasis on taking full advantage of the U. S. Department of Agriculture (USDA) program designed to meet the needs of hungry children. One in six Ohio children could benefit from this federal food program.

The Task Force recommends that Ohio:

- Lobby Congress and work with USDA to extend the Summer Pilot of the Child and Adult Care Food Program (CACFP) nationally and to increase reimbursement rates for all USDA Programs. Higher food prices do not just affect families; they also affect those programs offering meals.
- Provide incentives to any school districts offering summer programs to provide access to a USDA Child Nutrition Program. Current legislation directs schools in which 20% of the students are low-income to participate in USDA Child Nutrition Programs.
- Review current policy at the Ohio Department of Education around child-care providers’ participation in the USDA Child Nutrition Programs.
- Advocate for changes in guidelines concerning where and at what time a child can eat food during the summer feeding program. Eating all meals in the building may not be practical in every case. The mandatory waiting period between breakfast and lunch and the prohibition of taking home leftovers should be questioned. Each sponsor should be able to adopt a schedule that fits their particular situation without being penalized for doing so.

## **(E) Increase Access to High Quality Early Childhood Development Programs and Family Supports for Children 0-6**

Continue to build on the Governor's investments in early childhood development strategies to provide high quality early childhood services to our most vulnerable children and their families. The Task Force recommends the following strategies:

- Maximize receipt of flexible funds from the American Recovery and Reinvestment Act eligible for early childhood programs, including:
  - use of Title I education funds for Pre-K
  - use of U.S. Department of Education state incentive and local innovation grants
  - use of U.S. Department of Education funds for Improving Teacher Quality grants
  - use of U.S. Department of Education funds for Education Data Systems, including early childhood
  - use of State Fiscal Stabilization Fund for applicable early childhood programs and renovation and repair of facilities
  - competitive grants through Early Head Start
  - quality funds of the Child Care and Development Block Grant (CCDBG)
  - funds for state Early Learning Councils
- Provide state incentives and guidelines for local communities to collaborate on coordinated use of ARRA, Title I, Head Start, Early Head Start and CCDBG funds at the local level.
- Support increased access to high-quality early care and education for all low-income Ohio families, including:
  - Maintaining current eligibility levels at 200% of the federal poverty level for child care, the Early Learning Initiative, and Early Childhood Education (Public Preschool)
  - Aligning, coordinating, and improving early childhood policies through the creation of a single administrative structure
- Support behavioral health programs for young children. Ohio's Early Childhood Mental Health Initiative addresses the social and emotional needs of children and their caregivers.
  - Increase its support of the Early Childhood Mental Health Consultation Program
  - Enact legislation in permanent language to guarantee that young children have access to the Early Childhood Behavioral Health Treatment Program
- Maximize state funds for the *Help Me Grow* program by utilizing Medicaid reimbursements for appropriate statewide services. The Task Force recommends that *Help Me Grow's* home visitation program be based on research and evidence and target Ohio's most vulnerable families.
- Allow full-day kindergarten programs to be delivered in community-based child care settings.

## **(F) Establish Tax Incentives to Attract and Retain High-Quality Teachers and Other School Staff**

Create a state Educator Expense tax credit that mirrors the federal deduction. Identify and recommend specific tax benefits for teachers and other school staff in high poverty districts, including consideration of tuition reimbursement, loan forgiveness, and income tax relief.

## **(IV) ENSURE TRANSPARENCY, ACCOUNTABILITY, AND LEADERSHIP**

*The following strategies are recommended to ensure that Ohio is more accountable for the progress of its anti-poverty efforts, that it is measuring investments in a uniform way, and that it is establishing ongoing interagency leadership.*

### **(A) Strategy: Establish Ongoing Interagency Leadership in Implementation**

Establish an interagency team, led by an appointee of the Governor, made up of representatives of key state agencies and other stakeholders, responsible for carrying out the recommendations included in this report.

The Governor's appointee and assembled team will: 1) establish key indicators, targets, and measurements; 2) establish a reporting and accountability system; 3) review progress, accountability, and investment reports; 4) identify resources for implementation; 5) help remove barriers and obstacles to implementation; and 6) issue annual progress reports to the Governor, the Cabinet, and the public.

### **(B) Strategy: Track Progress Using Key Indicators**

The Task Force recommends the creation of a state implementation plan based, in part, on this report and encourages counties to create similar plans, as well. These plans would establish targets for improvement from current baselines for key indicators related to poverty alleviation. The plan should include *no more than two-to-four targets* in each of the following categories:

- Quality of life indicators that support people moving out of poverty.
- Poverty measures.
- Public benefits and services access and coverage.

To achieve this recommendation:

- Select research-based indicators in each category.

- In collaboration with local agencies, determine current baselines and two-to-three year targets for the state and counties.
- Identify programs and activities that contribute to achieving targets.
- Develop a data collection, tracking, and reporting process for the programs, activities, and indicators at the state and county levels.
- Make information publicly accessible through the accountability Web site (Strategy D).
- Establish a process for ongoing dialogue to assess targets and modify them, if needed, based on changing conditions.

## **(C) Strategy: Establish a Universal System for Measuring State Investments**

Establish a system for measuring all state anti-poverty investments, including: 1) the type of investment; 2) amount invested; 3) other funds leveraged; 4) how the investment was used; and 5) how it contributed to poverty alleviation. Investments might include payments to individuals, grants to local government and organizations, staff time, and materials and equipment.

The following steps are recommended:

- Identify resources to be tracked and establish a uniform cross agency/program tracking system.
- Identify state agency reporting roles and responsibilities.
- Initiate tracking and reporting.
- Make information publicly accessible through the accountability Web site described in Strategy D.

## **(D) Strategy: Launch Tracking Web Site and Require Annual Report on Progress**

Establish data collection and reporting systems, including a public Web site and state agency reports, to measure progress in achieving the Anti-Poverty Task Force recommendations and make this information easily accessible to key decision makers, program staff, and the general public.

The following steps are recommended:

- Establish measurable benchmarks for each Task Force recommendation.
- Research best practices and models in accountability systems.
- Design accountability systems and identify resources for implementation.
- Identify state agency reporting roles and responsibilities.
- Initiate Web site and reporting.

# APPENDIX

Guiding Principles and Criteria for the Longer Term Recommendations

Shorter Term Recommendations

Newspaper Clips

# Guiding Principles and Criteria for the Longer Term Recommendations

## Guiding Principles for Recommendations

- 1) Basic needs must be met
- 2) Prevention works and we must invest in the future
- 3) People must be empowered and involved
- 4) We must maximize the quality of opportunity
- 5) Reducing the disparity of wealth by reducing poverty and strengthening the middle class will benefit all Ohioans
- 6) We must build an economy that works for everyone
- 7) We must think and act boldly with a commitment to new ideas and solutions

## Criteria for Recommendations

- 1) Must move people out of poverty or prevent them from falling into poverty – *The recommendation must be substantive and effective with the intended purpose of reducing or preventing poverty.*
- 2) Must be Measurable – *The recommendation must be proposed in a way makes clear to those implementing the recommendation how results will be tracked and how the overall effectiveness of the effort be measured.*
- 3) Must be Accessible – *The proposed initiative must be easily accessible to those it seeks to serve and consideration must be given to whether an implementation plan will be done in a way that maximizes participation.*
- 4) Must be done in consideration of the possible return on investment – *The recommendation must consider the effectiveness of the investment in terms of future savings or increased revenue to the state.*
- 5) Must be within our circle of influence – *The recommendation must be mindful of the Governor's ability to influence its implementation.*
- 6) Must be specific with a timeline and a determination of who will be responsible – *Clearly articulated timelines and the specific steps necessary to implement the initiative, including an indication as to who will be responsible for implementation, must accompany each recommendation.*

## Short Term Recommendations

- 1) Work through the appropriate state agencies to exercise the following options to reduce barriers to work supports and other benefits (with a particular emphasis on federally funded programs and children's healthcare):

- Expand categorical eligibility for food stamps

*Put in place on October 1, 2008. Determining countable resources can be complicated and in some cases the resource test discouraged clients from saving and building assets to enable them to move toward self-sufficiency and out of poverty. As a result, a new policy was put in place to eliminate the resource limit for all food stamp assistance groups.*

- Pursue electronic submission as well as telephone interview options to applicants for all work supports and other benefits

*Electronic submission of applications for cash assistance, food assistance, and Medicaid programs through the Ohio Benefit Bank was implemented in December 2008. Prior to this, the application was faxed, mailed or dropped off to the county agency. Electronic submission eases the application process for the clients and provides more complete applications for caseworkers to process.*

- To the greatest extent possible, align recertification periods for all work supports to 12 months and allow telephone or electronic recertification for all work supports (also submitted through the Interagency Coordination work group). Explore all other options to reduce barriers and increase access within the confines of current federal guidelines (eligibility requirements, verification processes, renewal procedures, and program application)

*The Governor's Office has convened a small "benefits and supports" work group to address recommendations 1, 2, and 16. Through a privately-funded grant awarded to the Governor's Office of Faith-Based and Community Initiatives from Living Cities, a national foundation, a temporary staff person will be brought on for 6-9 months beginning in March 2009 to lead this effort and to produce an implementation plan around the most practical and effective options to reduce barriers associated with work supports and benefits. Recommendations around aligning recertification of work supports to 12 months while simplifying recertification will be part of the agenda.*

- 2) Work through the heads of the major work support programs to expand outreach by using program enrollment information (food stamps, SCHIP, LI-HEAP, etc.) to identify through 'data matching' populations currently underserved (eligible but not claiming) (may need to consider a common consent form to be used across programs); and to develop strategies to expand access to their programs and establish more integrated intake procedures such as a universal application and a bridging application connecting various state databases

*The Governor's Office has convened a small "benefits and supports" work group to address recommendations 1, 2, and 16. Through a privately-funded grant awarded to the*

*Governor's Office of Faith-Based and Community Initiatives from Living Cities, a national foundation, a temporary staff person will be brought on for 6-9 months beginning in March 2009 to lead this effort and to produce an implementation plan around the most practical and effective options to reduce barriers associated with work supports and benefits. Expanding outreach efforts as described above will be part of the agenda.*

- 3) Work through the respective agencies to establish a single, simplified, and efficient process for low-income disabled Ohioans to access Medicaid and Social Security (SSI/SSDI) benefits. The process should eliminate duplicative steps, forms, and the number of entities involved in the current processes. The new process should reduce complexity (and associated costs) and result in improved service to clients

*The state Medicaid director and the executive director of Rehabilitation Services Commission (RSC) have established a work group to address this recommendation. They have been focused on collecting data that will be necessary to obtain CMS approval for a consolidated process. They have also initiated a joint policy and process committee that includes representatives from counties, ODJFS, RSC, and others to work through the details.*

- 4) Study the impact and feasibility of an Ohio earned income tax credit and review the learning produced by the Ohio Commission on the Earned Income Tax Credit

*The Governor's Office has asked OBM to analyze and report on the feasibility of implementing an Ohio EITC.*

- 5) Work through the Public Utilities Commission of Ohio to request that Ohio's utilities companies coordinate with the state on strategies to increase awareness of and participation in current energy assistance programs for low-income households

*The Governor's staff has worked with PUCO and with the Office of the Ohio Consumers' Counsel (OCC) to assess what is being done and what more can be done to inform and educate the public.*

*Currently, utility companies currently educate both eligible and potentially eligible customers about low-income programs through a variety of sources:*

- *Companies (gas and electric) send out bill stuffers in the fall for gas and spring for electric explaining the medical certificate program, which will assist a customer with a medical issue to maintain service for 30 days in an emergency situation.*
- *Companies also provide information on all disconnection notices which explain the payment plans (both PIPP and non-income based plans) and sources of federal, state and local government aid for payment of utility bills and home weatherization.*
- *When customers contact utility call centers, utility representatives are to explain the various payment plans available, send out HEAP applications and make referrals to local social service agencies for financial assistance. Customers are*

*also referred to both company sponsored and state sponsored weatherization programs.*

*Additional opportunities are being discussed.*

- 6) In response to rising food and fuel costs, request of Congress emergency assistance for Ohio foodbanks, an increase in the monthly food stamp allotment, and increase funding for home energy assistance (LiHEAP)

*On September 16, the Governor and Lt. Governor submitted a request for emergency assistance to members of the Ohio Congressional Delegation. The request includes additional financial assistance in the form of enhanced Federal Medicaid Assistance Percentage (FMAP), increasing food stamp benefits as well as the LIHEAP Block grant, and extending unemployment insurance.*

*Additional funding for the food assistance program, direct support to foodbanks, and unemployment insurance extensions were included in the recently passed American Recovery and Reinvestment Act.*

- 7) Work with the Ohio congressional delegation in support of senior meal programs, subsidized guardianship legislation (increased funding for kinship care programs), reversing recent (2005) child support enforcement funding cuts, and increased funding for Child Care and Development Block Grant (CCDF)

*On September 16, the Governor and Lt. Governor submitted a request for emergency assistance to members of the Ohio Congressional Delegation. The request includes the restoration of federal matching funds for state child support incentive payments. The recommendation has also been sent to staff in the Governor's Washington, D.C., office, who, in turn, will discuss these issues with the Ohio Congressional Delegation. The Fostering Connections to Success and Increasing Adoptions Act passed the U.S. House and Senate in September and will likely be signed by the President. The bill addresses subsidized guardianship and other foster care and adoption issues.*

- 8) Work through the Ohio Department of Commerce to identify opportunities to better educate Ohioans about tax refund anticipation loans and to investigate the feasibility and advisability of regulating fees associated with tax refund anticipation loans

*The Treasurer's office has agreed to take the lead and will work with others to identify opportunities to better educate Ohioans about tax refund anticipation loans and to investigate the feasibility and advisability of regulating fees associated with tax refund anticipation loans.*

- 9) Work through the Department of Transportation to identify resources for fuel supplement for public transit in Ohio's rural and urban areas to ensure services are maintained and routes are not reduced due to fuel price increases

*This has been completed and details will soon be sent to the Task Force.*

- 10) Work through ODJFS to submit the Family Planning Medicaid Waiver that would increase eligibility for family planning services to men and women at or below 200%

FPL. If approved, the federal government would provide 90% with only 10% needed in non-federal sources

*ODJFS is proceeding with the development of the waiver. They will work cooperatively with the Ohio Department of Health and other interested parties – this will likely take at least 6 months. The State Medicaid Director recently attended a session on family planning waivers sponsored by the National Association of State Medicaid Directors. Other states who have successfully developed and submitted waivers report that it takes a minimum of 18 months to complete the entire process.*

- 11) Encourage the formation of a statewide emergency hunger relief campaign (much like the local Harvest for Hunger or Operation Feed campaigns in Cleveland and Columbus, respectively) led by community and corporate foundations to raise funds for Ohio's foodbanks – and look for ways to include support for energy relief for struggling Ohioans

*The Governor issued a press release on September 19, 2008 encouraging Ohioans to make an "Emergency Relief" donation through the Ohio Association of Second Harvest Foodbanks.*

- 12) Explore the feasibility of establishing a liaison within the Administration focused on encouraging anti-poverty, public-private collaborations

*The Governor's office will report on the feasibility of establishing a liaison within the Administration focused on encouraging anti-poverty, public-private collaborations.*

- 13) Use local and private resources to expand the Ohio Benefit Bank by adding a foreclosure prevention platform. Incorporate use of the Benefit Bank in the foreclosure prevention and intervention efforts currently managed by the Ohio Department of Commerce, Ohio Department of Development, and Ohio Housing Finance Agency in collaboration with local housing counseling agencies

*This addition is being considered by the Ohio Benefit Bank office and other key stakeholders.*

- 14) Investigate and promote Green Collar Jobs programs throughout Ohio that will train and place unemployed individuals in living wage jobs

*In progress at the Governor's office, including a speech the Governor recently delivered to the Blue and Green Alliance. This will also be addressed in the longer term recommendations.*

*Significant investments in "Green Collar Jobs" were included in the recently passed American Recovery and Reinvestment Act.*

- 15) Work through the appropriate agencies to investigate the use of a Self-Sufficiency Index to provide a benchmark for anti-poverty efforts

*The Governor's office will begin discussions with agency staff and will work with OBM on a special analysis section of future budgets having identified the intended outcome of anti-poverty related investments as self-sufficiency.*

- 16) Conduct an inventory of major state agency administered programs that target low-income populations to determine their current performance measures and eligibility guidelines as a context for establishing longer term state anti-poverty targets

*This was completed in October 2008.*

- 17) Make use of the expertise of the Benchmarks and Measures work group to establish performance measures for various shorter term recommendations

*The Governor's Office is aware of this and may make use of this expertise.*

- 18) Consider including in future executive budget proposals an analysis on poverty, including the Governor's definition of poverty, an inventory of state programs designed to combat poverty, and some general performance measure targets around reducing poverty

*The Governor's Office will assist OBM in adding this to the special analysis section of future budgets.*

- 19) Work through the Ohio Board of Regents to engage colleges and universities on establishing a match to the AmeriCorps and AmeriCorps\*VISTA education award

*The Governor's office will connect with the Board of Regents regarding the recommendation to engage colleges and universities on establishing a match to the AmeriCorps and AmeriCorps\*VISTA education award.*

- 20) Continue to support initiatives to raise awareness of the issue of poverty in Ohio and engage the public in identifying and implementing methods for addressing poverty in communities throughout Ohio

*On behalf of the Ohio Anti-Poverty Task Force, the Ohio Association of Community Action Agencies (OACAA) hosted 22 regional conversations on reducing poverty in Ohio.*

- 21) Encourage state and county employees dealing with poverty issues to attend a simulation and Bridges Out of Poverty training

*The Governor's Office is investigating the feasibility of this recommendation.*

- 22) Work with the Corporation for National and Community Service in Ohio to increase the number of support Circles initiatives in the state as part of this effort

*Discussions between GOFBCI and the Corporation for National and Community Service are in progress.*