



Date: February 12, 2025

To: TANF WPAC

From: Department of Children and Families

Re: Quarter 1 TANF Work Programs Advisory Committee Meeting Minutes

Attendance:

Present (Virtually): Autumn Morgan, W-2/MAXIMUS; Gina Brown, W-2/WCI; Jackie Schwartz, TJ/WRI; Kaye Hartmann, W-2, UMOS; Maudwella Kirkendoll, Community Advocates; Patara Horn, DCF; Michelle Szabrowicz, W-2/FSC; Sarah Kaminski, W-2/Equus; Alex Eisold, TMJ/Equus; Carlyle Outten, AWWI W-2; Thomas Prescott Jr, ROSS W-2 (Proxy for Nicole Hagen)

Absent: Connie Chesnik, DCF; Jody Conner, WRI W-2; Larry Dupuis, Legal Action; Lisa Omen FSC W-2; Nikia Morton Community Action; Nicole Hagen Ross W-2

Invited Guests: Linda Richardson, DCF; Anna Sainsbury, DCF; Audrey Evert, DCF; Chloe Kepler, DCF; Rob Schampers, DCF

Opening Statements and Call to Order

Attendance and opening statements were made. Patara thanked the committee for their flexibility in meeting virtually last minute due to the weather conditions and opened the meeting in Connie Chesnik's absence.

What To Bring With You Publication

Chloe Kepler provided an overview of the *What to Bring with You* publication, explained its history, and shared updates on recommended changes. She noted that they met with agency staff focus groups to discuss areas of improvement and are currently planning to replace the publication with two separate documents: a public-facing publication for W-2 participants and a separate publication intended for agency staff training and reference.

Chloe also provided a list of discussion points and invited committee members to share their thoughts on the publication.

Sarah Kaminski from Equus stated that the form is often read by staff and translated for applicants. She explained that applicants find the table overwhelming, typically focusing on the bolded information on the left while ignoring the middle and struggling to understand the right side of the table.

Michelle Szabrowicz from FSC agreed with Sarah, adding that the form can be overwhelming, especially for someone in crisis.

Gina Brown from WCI echoed these concerns, emphasizing the need for simplification and plainer language. She noted that the publication currently provides so much information that key details are being overlooked. While tables can be useful for quickly conveying exact answers, she questioned whether this document effectively serves that purpose. She also observed that workers often use the form as a checklist for both applicants and themselves.

Sarah Kaminski suggested including verbiage directing workers to check ECF for required information instead of expecting applicants to resupply information that has already been verified in ECF.

Patara Horn asked whether the form would be available for applicants to review ahead of time so they could prepare the necessary documents before meeting with a worker, allowing for same-day approval.

Audrey Every explained that they are exploring the possibility of creating a participant-facing video outlining what to bring. This video would be available on the W-2, EA, and JAL web pages. Additionally, they are considering including a direct link to the publication on these webpages. While the publication will be available in the publication repository, she acknowledged that this may not be easily accessible to those unaware of its existence.

Chloe Kepler highlighted the need to clarify which verifications are required only once, such as SSN and immigration status, versus those needed for continuous verification.

Both Sarah Kaminski and Michelle Szabrowicz requested a more transparent section on what *not* to bring, particularly to help protect applicants' digital financial information.

Kaye Hartmann from UMOS suggested including language explaining the importance of submitting clear and legible images.

Sarah Kaminski supported Kaye's suggestion, emphasizing the need to educate applicants on securely submitting their information. She noted that if the publication includes instructions on how to share information, it should also explain best practices for safeguarding confidential data.

Patara Horn agreed, suggesting that this information could be presented in different formats. She proposed that a video format could include examples of acceptable screenshots, which would be particularly helpful for visual learners.

Medical Capacity and Mental Health Report Form Combination

Chloe Kepler reviewed and requested feedback on the Medical Examination and Capacity Form. Chloe noted frequent issues with incomplete forms submitted by

providers, requiring workers to follow up. Kaye Hartmann mentioned delays in accessing specialists, especially in rural areas, affecting form completion.

Autumn Morgan from Maximus highlighted concerns that the forms contain too much medical jargon, making it difficult for workers to use the information effectively in employability planning.

Sarah Kaminski emphasized the importance of creating forms that build a conversational relationship between participants and providers, rather than static data collection.

Several committee members mentioned that treatment history questions and diagnosis details are largely irrelevant to case management and can complicate the worker-client relationship.

Need for Form Simplification – Several committee members pointed out that workers are not medical professionals and should not be expected to interpret complex medical information. The group strongly supported removing irrelevant questions and focusing on functional capabilities and necessary accommodations. Committee members stressed reducing redundancy, avoiding requesting medical diagnoses, and simplifying to focus only on impacts relevant to work capacity.

Recommendations for New Form Structure – Committee members suggested starting from scratch instead of continuing to edit existing forms. Ideas included building a checklist of capabilities and activities rather than requiring narrative responses. There was consensus on involving medical professionals and case managers in a workgroup to create HIPAA-compliant, user-friendly forms.

Michelle Szabrowicz recommended involving frontline workers and healthcare providers early in the redesign process.

Gina Brown and Patara Horn suggested that moving toward a whole-family, strength-based approach would better align with case management philosophies.

Chloe thanked everyone for their feedback and confirmed that the following suggestions will be considered in future revisions.

- Future workgroup(s) involve medical professionals, frontline staff, and policy makers.
- Design a new, simplified form focused on participant capabilities and reasonable accommodations.
- Eliminate unnecessary questions about diagnoses and treatment history.
- Increase education efforts for providers completing forms.
- Explore relying more heavily on participant self-reporting when appropriate.

Case Worker Policy Assistant Tool

Robert Schampers from the TANF Automation Section provided a demonstration of the Caseworker Policy Assistant Tool, highlighting its features, intended use, and integration into the CWW system.

This is a new tool that will be available in CWW starting on the February 24, 2025. It allows caseworkers to receive comprehensive, guided responses to policy questions directly within the system using AI.

The model is closed, meaning it only has access to approved materials like handbooks and manuals, not the open internet. Which keeps it focused and secure.

The goal is to make it easier for staff to locate policy guidance quickly. It's not meant to replace research or final decision-making, but to support the process by directing staff to relevant manual sections.

Once the tool is opened, a welcome message appears. It reminds users not to screenshot responses, not to share outside the organization, and not to input any Personally identifiable information or Protected health information.

Feedback can be provided using thumbs-up or thumbs-down. Feedback is monitored and used to train the AI to improve future responses. There's also a comment field where feedback is collected and reviewed quarterly by Deloitte.

Abigail Tessmann of DCF noted, if we want to add additional manuals to this tool, it will take time. It's not just uploading content; it also involves testing to ensure the tool gives accurate responses based on the new material.

Emerging Technologies, AI, and Training Needs

Linda Richardson led a conversation around how new technologies influencing service delivery in human services. Linda explained that this conversation was prompted by national trends and recurring themes at conferences and meetings with federal partners. Technology, especially artificial intelligence, is becoming increasingly relevant in the field and there's growing curiosity about its impact on workforce development, training requirements, and service delivery models. Linda invited committee members to reflect on changes, needs, and limitations.

Linda emphasized that DCF's current use of AI is limited and controlled. The Caseworker Policy Assistant, introduced earlier, is an example of a closed AI system that only draws on pre-approved internal content, such as handbooks and policy manuals. She clarified that the state is not currently using generative AI (e.g., ChatGPT) due to concerns around security, data accuracy, and potential exposure of participant information. A statewide working group has been organized to explore the ethical use of AI and better understand the risks and possibilities for broader integration. Data confidentiality remains one of the key constraints.

Patara Horn expressed interest in the potential benefits of AI tools like the Caseworker Policy Assistant, especially for newer staff. However, she emphasized the need for thorough training to avoid overreliance or misinterpretation of AI generated content. She raised concerns about equity, particularly regarding digital access and literacy among participants, and stressed that technology must be paired with human centered support.

Gina Brown echoed concerns about accessibility and training. She emphasized that while innovation is welcome, clear guidance is needed for staff on how to use tools like AI responsibly. She also stressed that technology should support, not replace, relationships with participants.

Michelle Szabrowicz raised questions about data privacy and oversight, particularly where external providers are involved. She suggested that AI-related implementations be accompanied by transparency around how tools make decisions and how they should be used by staff.

Autumn Morgan expressed support for tools that streamline work, while emphasizing the importance of staff readiness and feedback loops. She noted that pilot and live environment testing and are essential to ensure tools are practical, not just technically sound.

Committee member expressed openness to using technology to improve service delivery and case management, however there is strong consensus on the need for robust training, data protections, and maintaining human-centered relationships in service delivery.

2025 WPAC Planning Discussion

Patara Horn opened the discussion by inviting committee member to provide input on the structure, focus, and priorities for 2025 committee meetings. The goal was to assess what has been effective, identify areas for improvement, and determine key topics that should be prioritized moving forward.

Meeting Structure and Purpose

Patara discussed the department's vision of creating a collaborative space for agencies and community partners to discuss program related issues and priorities as well as the need for decision-making authority within the group to ensure discussions translate into actionable outcomes.

Gina Brown noted the importance of discussions leading to tangible improvements rather than being purely informational.

Sarah Kaminski emphasized the value of maintaining this space to ensure agencies have a collective voice in shaping program policies.

Michelle Szabrowicz raised concerns about overlap between this committee and contractor calls, suggesting a clearer distinction between the two. Michelle also suggested that this committee should focus on higher level topics, such as workforce impacts, emerging technologies, and program innovations.

Some topics may be better suited for meetings where staff overseeing day-to-day operations can provide direct feedback.

Gina Brown and Michelle Szabrowicz highlighted the need for improved coordination with other departments (i.e. DWD/DHS,) to ensure alignment on policy and operational changes.

Emerging Technologies and Learning from Other States

Committee members expressed strong interest in discussing the role of AI and other emerging technologies in program administration.

Michelle Szabrowicz discussed the importance of staying informed on technological advancements that could improve program efficiency and accessibility and agreed with Patara that exploring emerging technologies, particularly AI, should remain a focus.

Michelle suggested incorporating insights from other states to understand successful innovations and best practices and emphasized the importance of discussing the department's budget vision and planning for upcoming changes.

Patara supported this idea and will explore inviting representatives from states piloting new programs to share their experiences.

Community Partnerships and Program Coordination

Jackie Schwartz expressed uncertainty about their role in the meeting, feeling disconnected from the W-2 program discussions. She noted that community partners sometimes struggle to see how these meetings directly apply to their work and suggested incorporating conversations on how the W-2 program interacts with other support programs such as TJ/TMJ.

Jackie also proposed adding representation from Child Support Liaisons (CSL) to improve coordination across programs.

Patara agreed and committed to exploring ways to enhance program collaboration within the committee's framework.

Conclusion and Next Steps

Patara reaffirmed that the committee's structure and focus will remain flexible to ensure meetings are meaningful and productive and encouraged members to continue providing feedback on agenda topics and priorities.

Patara closed the meeting stating that she would explore ways to incorporate insights from other states, technological advancements, and budget discussions into future meetings. She also emphasized the importance of ensuring all voices—agencies and community partners are represented in the conversation.