



### Requester Information

**Legislator Name:** Clancy, Tyler

**Created Date:** January 21st 2025

**Submitted Date:** January 21st 2025

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### Section 1: Requester Details

#### Description:

Funding is requested to establish the Utah Navigation and Financial Planning for Self-Reliance pilot project under the Department of Workforce Services. The project is intended to identify a framework of interventions that better empower Utahns on public assistance who at times constrain their earned income due to fear of triggering “benefits cliffs,” to confidently pursue and accept opportunities for work and other forms of economic progression. The pilot would run over a 3 year time period and be targeted to serving TANF eligible families. The objectives of the pilot project are: 1) Improve participants’ awareness of how potential changes in their earned income impact their public assistance benefits through enhanced financial planning resources; 2) Improve participants’ ability to transition off of government benefits and into self-sufficiency through work with community-based coaching and mentorship from local nonprofits with a proven track record; 3) Gather real time administrative data on participants’ income, benefits, program utilization, household composition, and other factors that may impact eligibility, as well as the impact of the tested interventions in this pilot, to identify areas of future reform. Funding is requested in the amount of \$6,000,000 in TANF to be spent over 3 years

#### Legislative designee contact information:

**Name:** Casey Cameron

**Organization:** Department of Workforce Services

**Position:** Executive Director

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### Section 2: Funding Information

**How will the appropriation be used?**



# Navigation and Financial Planning for Self-Reliance

## Economic and Community Development

Category	One-time		Ongoing
<b>Personnel Services</b>	2025:	\$0.00	\$0.00
	2026:	\$650,000.00	
<b>In-State Travel</b>	2025:	\$0.00	\$0.00
	2026:	\$0.00	
<b>Out-of-State Travel</b>	2025:	\$0.00	\$0.00
	2026:	\$0.00	
<b>Supplies and Equipment</b>	2025:	\$0.00	\$0.00
	2026:	\$50,000.00	
<b>Technology Purchases</b>	2025:	\$0.00	\$0.00
	2026:	\$300,000.00	
<b>Infrastructure/Capital Investments</b>	2025:	\$0.00	\$0.00
	2026:	\$0.00	
<b>Other Charges/Pass Thru</b>	2025:	\$0.00	\$0.00
	2026:	\$5,000,000.00	

### Expenditure Total

One-time 2025	One-time 2026	Ongoing 2026
<b>\$0.00</b>	<b>\$6,000,000.00</b>	<b>\$0.00</b>

### Funding Sources:

#### Federal Funds

Amount Requested:

<b>2025 (One-time)</b>	<b>\$0.00</b>
<b>2026 (One-time)</b>	<b>\$6,000,000.00</b>
<b>2026 (Ongoing)</b>	<b>\$0.00</b>

### Revenue Total



# Navigation and Financial Planning for Self-Reliance

Economic and Community Development

One-time 2025	One-time 2026	Ongoing 2026
\$0.00	\$6,000,000.00	\$0.00

**Is this a multi-year project?**

Yes

**Is this project scalable if the Legislature does not fund the full requested amount?**

Yes

**A short explanation describing how the project might be scaled?**

Yes, however the funding will determine the number of individuals served. Decreasing the funding request will impact the results of the pilot, as a statistically valid sample size is needed to properly evaluate the impact of these services in helping individuals on safety net programs progress towards self-sufficiency

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## Section 3: Agency Information

**Subjects:**

Labor and Employment

**Agency:**

600 / Workforce Services

**Type of entity to receive pass-through funding:**

State Government

**Grant recipient**

No

**Requested Direct Award Grant Recipient**

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## Section 4: Performance Outcome Measurement



### **Who would benefit the most from this request (who is the target audience)?**

Families receiving public assistance (Medicaid, SNAP, CHIP, Heat, child care and FEP) who are also TANF eligible.

### **What is this project or program intended to accomplish?**

The objectives of the pilot project are: 1) Improve participants' awareness of how potential changes in their earned income impact their public assistance benefits through enhanced financial planning resources; 2) Improve participants' ability to transition off of government benefits and into self-sufficiency through work with community-based coaching and mentorship from local nonprofits with a proven track record; 3) Gather real time administrative data on participants' income, benefits, program utilization, household composition, and other factors that may impact eligibility, as well as the impact of the tested interventions in this pilot, to identify areas of future reform.

### **How will the Legislature know whether the project or program achieved its intended purpose?**

Tracked metrics from the third party evaluator include the following: Household earned income (tracked monthly) Household benefit allotments for each program (tracked monthly and broken out by program) Household size and composition (including # of adults and children in the home, marital status) tracked monthly Regular surveys of test group participants about their experiences in the pilot, and their perceptions of benefits cliffs, and their attitude toward increasing their earned income, and their decision-making process regarding work and earned income relative to public assistance benefits. Impact of financial planning resource and community coaching resource on decision making of participants relative to pursuing/accepting work opportunities

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## **Section 5: Other Supporting Documents**

### **Intent Language Documents**

- Post Public Assistance Stability - FY26 Budget Request.pdf

### **Previous Funding Documents**

### **Full Time Employees**

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