

**Jo Anne B. Barnhart**

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**PROFESSIONAL HISTORY****Adjunct Lecturer, Kennedy School of Government, Harvard University (2008-2018)**

Developed and teach a graduate level course on Designing Social Security Programs for candidates seeking Masters in Public Policy and Masters in Public Administration. The course examines philosophical, political, economic, demographic, and structural issues that come into play in designing and developing Social Security systems. It provides a multi-national comparative walk-through from moral obligation to payment issuance identifying and analyzing the various factors that influence decision-making for program policy and considering the policy implications for developing successful, sustainable programs.

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**Jo Anne B. Barnhart Consulting****South Carolina, Office of the Director, Department of Social Services (DSS) (June 2011-September 2011)**

One of a team of consultants who have been engaged in a short-term contract with DSS to review current policies, procedures, and implementation practices for engaging TANF applicants and recipients in work activities; to recommend policies, procedures, and implementation practices that would provide for a more effective applicant and participant work participation program; and to help DSS management and staff develop tools to implement the recommendations. Included in the contract is the consideration of an up-front program; the adoption of additional services, including a subsidized work program; the redesign of the sanction policy; and the introduction of cost-effective financial incentives. Also working with South Carolina to design changes to the employment-related services offered to SNAP recipients.

**State of Hawaii Department of Human Services (2008 – 2011)**

As a subcontractor to Benton & Associates, provided assistance in program reviews of field offices to assess progress in meeting the Department's strategic goals and objectives and assisting with staff reorganization to realign functions and personnel to meet outcome goals, increase accountability, and enhance communication. Review project included developing survey tool, conducting interviews (individually and in groups), analyzing data collection activities and reports, and assessing program effectiveness to identify areas for improvement; drafting final report including findings and recommendations; and action plans to implement recommendations. Reorganization project involved facilitating restructuring of Bureau of Employment and Support Services to address management, communication, and accountability issues. Provided policy, budget and operational consultation to restructure child care subsidies and develop electronic benefit determination. Developed and conducted training to redesign client orientation conducted by employment services staff.

**State of Washington, Office of Financial Management (2009):** Under a contract to Chassman Consulting Inc., provided assistance to the State of Washington to review and identify General Fund and community third-party expenditures that met one of the four purposes of TANF and could otherwise be utilized as TANF MOE; review Washington's TANF State Plan and other relevant documents to identify needed amendments to claim

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expenditures; meet with potential MOE providers to assist them to understand the importance of participating in the project and the information they would be required to provide; develop methodologies and processes to determine the amount of funds from each contributor that could be counted; and assist Washington to document the expenditures for federal reporting. Actual excess TANF MOE expenditures reported by other State, city and county agencies and foundations and non-profit organizations for FY2009-2010 yielded countable MOE expenditures of over \$785 million.

### **Empowerment Institute, NISH - National Institute for the Severely Handicapped (2008-current)**

Provide consulting services to Institute to assist in developing models to test various methodologies for promoting and enhancing employment of people with severe disabilities. Work includes assisting in developing strategic plan and vision, action plan for implementation and on-going advice and counsel.

### **Commissioner of Social Security (2001-2007)**

Nominated by President George W. Bush and confirmed by the U.S. Senate, As Commissioner was responsible for administering the Social Security retirement, survivors and disability programs as well as the Supplemental Security Income (SSI) program. Directed the Independent agency with a program budget of \$550 billion, an administrative budget over \$9 billion, and a workforce of almost 65,000 in 10 regional offices and 1,500 offices nationwide. The agency's programs provided financial protection to 160 million workers and their families, monthly Social Security benefits to more than 48 million Americans, and SSI monthly benefits to 7 million individuals.

As the longest serving woman and third longest serving Commissioner in agency history, led the development and implementation of Electronic Disability (e-DIB) creating an electronic system for taking and processing applications and associated medical documents for disability benefits. Within one year of e-DIB implementation, Social Security became the largest repository of medical records in the world.

Worked with advocacy groups, the Judicial Conference, employee unions and the Congress to develop and issue regulations for Disability Service Improvement, the first major changes in disability processing since the program's inception in the 1950's.

Represented the agency in testimony before Congressional oversight, budget, and appropriations committees.

### **Chassman-Barnhart Consulting**

Chassman-Barnhart Consulting provided public policy consulting services to the federal government agencies and state and local governments on welfare and social service program design, policy implementation, evaluation, and legislation.

A brief summary of major public policy accounts includes:

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### **New York City Human Resource Administration (1999)**

Part of a consulting team that provided assistance to the New York City (NYC) Human Resource Administration (HRA) in implementing its “full engagement” welfare reform initiative. With Kaiser Group, Curtis and Associates, and Arbor, Inc., worked with the Directors and staff of HRA’s Job Centers to assist them in developing implementation plans, train staff, and utilize community resources to assist individuals eligible under the federal TANF (Temporary Assistance to Needy Families) program to engage in activities which promoted their ability to become self-sufficient. Additional project tasks included on-site data collection related to program outcomes, distribution of workload, and client flow.

### **Welfare to Work Program (1998-2001)**

Working with the American Institute for Full Employment (AIFE), provided technical assistance to two Welfare to Work (WtW) program grantees in their implementation of large competitive awards from the U.S. Department of Labor (DOL). The Institute for Responsible Fatherhood and Family Revitalization (IRFFR) and AIFE received a \$4.4 million grant to develop employment programs to serve non-custodial parents in six cities with significant barriers to employment. Bethel New Life, with AIFE as a subcontractor, used its \$2.2 million grant to establish career ladder employment programs on the West Side of Chicago.

Provided advice to IRFFR management officials; trained IRFFR staff in welfare reform and WtW goals and policies; developed eligibility forms, processes, and manuals; identified processes and functions to be performed and assisted in workload distribution; assisted in establishing collaborations with TANF agencies and Private Industry Councils; and on-site data collection to review and monitor start-up and ongoing operations and preparing written monitoring review reports. Assisted Bethel in designing its work flow provided on-going technical assistance in other start-up areas and conducted a program review of Bethel’s People Work WtW project.

### **Delaware Division of Social Services (1999-2000)**

Provided technical assistance to the State of Delaware Division of Social Services to strengthen its Welfare to Work program and to increase its TANF work participation rate. For both projects, analyzed current processes, determined processing changes needed, assisted in developing plans to correct existing operational and organizational processes and add new programs where needed. Also assisted the State in responding to federal inquiries about past performance in both areas, including factoring the State’s welfare reform waiver provisions into its participation rate.

### **Kentucky Department of Social Insurance (1998-2001)**

Working for the American Institute for Full Employment, provided expert technical assistance to the Kentucky Department of Social Insurance in the design and development of Kentucky’s Wage Supplementation program. Presented information on successful state wage supplementation/grant diversion programs; assisted in developing client flow integrating grant diversion into TANF employment-based activities; identified and helped resolve issues associated with operational design; assisted in identifying appropriate policies and procedures; and helped develop a pilot program to test the resulting program. After implementation, reviewed the operational pilots, including on-site data collection, to determine whether procedures were implemented and whether the program met expectations. Developed necessary changes prior to statewide implementation and

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provided advice on structuring welfare reform efforts to take advantage of the flexibility provided under the TANF program.

### **Kentucky Cabinet for Families and Children (1999-2000)**

Continued to provide technical assistance to facilitate the ongoing efforts of the State of Kentucky Cabinet for Families and Children for welfare reform. Activities included providing assistance in the interpretation and implementation of the TANF regulations; assisting in identifying and resolving program operational issues; developing recommendations to enhance the receipt of federal revenues; identifying methods to enhance program coordination and integration with community based organizations; and maximizing program outcomes related to meeting federal participate rate requirements.

### **Arkansas Department of Human Services (1999-2000)**

As Subcontractor to Dyncorp, monitored performance of 75 County departments and 69 local coalitions in carrying out their duties under the State's Transitional Employment Assistance program to report on issues regarding process measures, outcome measures, and financial activities. Products included on-site monitoring visits and reports, including findings and recommendations for corrective action; follow-up on-site visits; and reports documenting progress in implementing corrective actions.

### **Connecticut Department of Family Services (1998-2000)**

As subcontractor to Benton and Associates, provided recommendations in the form of comprehensive written reports to the State of Connecticut Department of Family Services for utilizing the TANF Block Grant and Child Care and Development Block Grant (CCDBG) established by the federal PRWORA (Personal Responsibility and Work Opportunities Reconciliation Act) to accomplish the goals of welfare reform, minimize the risk of TANF fiscal penalties, and maximize receipt of welfare reform revenues from the federal government.

### **Virginia Department of Social Services (1998-2000)**

As Subcontractor to Benton and Associates, provided technical assistance to the Commonwealth of Virginia Division of Social Services to identify the strengths and weaknesses and best practices in the operation of the Fee Day Care program and to develop policy options for financing Fee Day Care. Products included conducting interviews and developing a report including findings and recommendations for process improvements in the Fee Day Care program; and conducting a survey of fee day care policies and financing methods in other states and developing a report including findings and recommendations.

As subcontractor to Benton and Associates, provided recommendations for utilizing the TANF and CCDBG Block Grants established by PRWORA to accomplish the goals of welfare reform, minimize the imposition of TANF fiscal penalties, and maximize participation rates and receipt of welfare reform revenues.

### **Idaho Division of Welfare (1998)**

As subcontractor to SSCI, reviewed the implementation and delivery of child support enforcement services for the State of Idaho Division of Welfare. Recommendations included advice on executive management, director duties and responsibilities, planning activities, organizational structure and workload analysis, and development of performance measurements.

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### **U.S. Department of Health & Human Services, Office of Child Support Enforcement (1998)**

As subcontractor to BDM, International, Inc., assisted in developing a framework for automating the state self-assessment required under PRWORA and identifying other essential system attributes necessary for conducting successful state self-assessments. As part of this effort, conducted a survey of 17 states, both on-site and via teleconference, to obtain information to develop a model process self-assessment, including identification of data elements and ensuring validity and comparability of data from state to state. Two reports, the *Report on State Self-Assessment Study Results* and the *Report for State Use in implementing Self-Assessment Study Results* were produced. The second report summarized successful State processes and Techniques.

### **Texas Workforce Commission (1997)**

As subcontractor to the Hobbs Company, conducted a review of reports and studies evaluating efforts to increase work activity and help two-parent families obtain employment. Based on experiential data and analysis of Texas work participation rates, caseload characteristics and program policies, developed a report including operation and policy recommendations to increase participation rate for TANF unemployed parent families.

### **Texas Department of Human Services/Texas Workforce Commission (1997)**

As subcontractor to the Hobbs Company, assisted the Texas Department of Human Services and Texas Workforce Commission to develop a pilot project to test a work first employment initiative which included a subsidized work program. Provided guidelines for the pilot and developed a full operating plan for implementation.

### **SSI Awareness and Access (1997)**

As subcontractor to Benton & Associates, assisted in identifying the state and local child welfare agencies doing the best job in securing access to SSI on behalf of children in substitute care, and in documenting the Best Practices in those jurisdictions. Developed a paper, *Privatization of SSI Advocacy: The State Experiences and Lessons Learned*, presented to a national conference on SSI Advocacy.

### **Political Director**

#### **National Republican Senatorial Committee (1995-1996)**

As political director worked with 34 U.S. Senate campaigns across the nation providing assistance with strategy, polling and grassroots support.

### **Professional Staff**

#### **U.S. Senator William V. Roth, Jr. (R-DE) (1993-1994)**

Served on the staff of U.S. Senator William V. Roth providing legislative and policy advice and oversight on Social Security, health, welfare, child and family, women's rights and other domestic policy issues.

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**Consultant**  
**Children's JUSTICE Center**  
**Tulsa, Oklahoma**  
**(1993)**

Designed and conducted a national survey of crisis intervention and long-term providers (including hospitals, state and local government agencies, and private non-profit social service agencies) to determine the need for, desirability of, and local network support for establishing a Children's JUSTICE Center to provide diagnostic and treatment services to sexually abused children.

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**Assistant Secretary for Children & Families**  
**U.S. Department of Health & Human Services**  
**Washington, D.C.**  
**(1991-1992)**

Directed the agency with responsibility for over 60 federal programs directed at the well-being of children and families, including programs to support family self-sufficiency like the Job Opportunities and Basic Skills (JOBS) program, Aid to Families with Dependent Children (AFDC), Child Support Enforcement, various Child Care programs, and programs to strengthen families such as Head Start, Child Welfare Services, National Center for Child Abuse and Neglect, Community Services and Social Services Block Grants, and Domestic Violence Services. As the principal operating official, directed a headquarters central office and 10 subordinate regional offices. Managed workforce of 2,000 employees and annual budget of \$28 billion. Represented the agency before Congress and defended the President's budget and legislative proposals.

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**Assistant Secretary for Family Support**  
**U.S. Department of Health & Human Services**  
**Washington, D.C.**  
**(1990-1991)**

Nominated by President George H.W. Bush and confirmed by the U.S. Senate, directed agency with responsibility for the nation's largest cash assistance programs including Aid to Families with Dependent Children Child Support Enforcement, Low Income Home Energy Assistance and Refugee Resettlement. Directed a workforce of 1,000 employees and an annual budget of \$17 billion. In 1991, was named the first Assistant Secretary for newly formed Administration for Children and Families (details above) which combined the programmatic responsibilities for cash assistance of the Assistant Secretary for Family Support with the social services responsibilities of the Assistant Secretary for Human Development Services. Began major initiative to grant waivers to state agencies allowing experimentation in delivery of cash assistance welfare which provided results and data that helped form the basis for welfare reform legislation passed in 1996. Represented the agency before Congress and defended the President's budget and legislative proposals.

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**Minority Staff Director  
Government Affairs Committee  
U.S. Senate  
Washington, D.C.  
(1986-1990)**

Directed a staff for the Full Committee which had broad oversight jurisdiction and which was the center of activity for legislative initiatives including government management, personnel, and financial issues. Directed efforts to develop legislation that led to eventual passage of the Government Performance and Results Act, the Chief Financial Officers Act, and expansion of the Inspectors General Act to additional federal agencies.

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**Consultant  
Office of Policy Development  
The White House  
Washington, D.C.  
(1986)**

Worked in conjunction with Office of Policy Development principals in the development of welfare program initiatives and played an integral part in the development of President Reagan's welfare reform report, *Up from Dependency*.

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**Associate Commissioner for Family Assistance  
Social Security Administration  
U.S. Department of Health & Human Services  
Washington, D.C.  
(1983-1986)**

As a Reagan appointed official, administered the Aid to Families with Dependent Children (AFDC) program, the Low income Home Energy Assistance (LIHEAP) program and the Repatriation program. The AFDC program served over 10 million Americans with an operating budget of \$14 billion. As the principal operating official, directed a headquarters central office organization and 10 subordinate regional offices. Responsibilities included administrative, day-to-day, and programmatic operation of the Office of Family Assistance, including overseeing analysis of state AFDC error reduction efforts to meet requirements of the Michel Amendment, evaluating corrective action efforts and making recommendations to the Secretary of the Department related to granting Michel Amendment waivers to states. Accomplished agency objectives through a staff of 700 employees. Represented the Agency before the Congress and defended the President's budget, legislative proposals, and Michel Amendment waiver recommendations.

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**Deputy Associate Commissioner for Family Assistance  
Social Security Administration  
U.S. Department of Health & Human services  
Washington, D.C.  
(1981-1983)**

As Deputy Associate Commissioner, served as alter ego to Associate Commissioner and performed the duties described above in directing the operation of the Office of Family Assistance.

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**Legislative Assistant  
U.S. Senator William V. Roth, Jr. (R-DE)  
Washington, D.C.  
(1977-1981)**

Legislative responsibility for health, welfare, children's programs, Social Security, aging, disability, veterans, labor, and domestic nutrition and women's rights issues. Coordinated U.S. Senate Senior Citizen Intern program for all Congressional offices. Managed office college intern program.

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**Project Director  
SERVE Nutrition Project  
Wilmington Senior Center  
Wilmington, Delaware  
(1975-1977)**

Developed the budget for and administered the SERVE senior citizen nutrition program which provided over 1,000 meals per day at nine locations for senior citizens. Directed a staff of 65 employees including site managers, volunteer coordinators, and culinary staff. (SERVE was funded under Title VII of the Older Americans Act.)

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**Legislative Liaison/Administrative Assistant  
Mental Health Association of Delaware  
Wilmington, Delaware  
(1973-1975)**

Organized and conducted fund raising campaigns, recruited members, and organized and developed additional Chapters. Served as staff liaison to the Board of Directors. Wrote and produced the agency newsletter and all promotional literature. Provided all background documentation and sole testimony on behalf of amendments to the Delaware Code affecting patients with mental illness. Instrumental in securing passage of the first Patient Bill of Rights and substantial revisions to the laws governing 72-hour commitment and long-term commitment to a state mental institution.

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**Space and Time Buyer/Traffic Manager**  
**deMartin-Marona & Associates**  
**Wilmington, Delaware**  
**(1970-1973)**

Researched cost effective space and time purchases for commercial and consumer clients and prepared production schedules for client jobs including lay-out, design and printing.

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**BOARDS AND COMMITTEES**

**Member**  
**Shelter House Board of Directors**  
**Fairfax, Virginia**  
**(2008-2011)**

Shelter House is a non-profit homeless shelter for families with children. Over 70% of families assisted are working.

**Member**  
**Social Security Advisory Board**  
**(1997-2001)**

Appointed and confirmed by the U.S. Senate in March, 1997 to complete two years of an unexpired term. In October, 1998, reappointed to serve a six year term. The Advisory Board was created by PL103-296, establishing Social Security as an Independent Agency to advise the Commissioner on policies related to the old-age survivors, and disability insurance program under Title II of the U.S. Code and Supplemental Security Income program under Title XVI.

**Secretary**  
**Taxpayers Association of Indian River County**  
**2019-2022**

**Board Member**  
**Taxpayers Association of Indian River County**

**Vice President**  
**Vero Beach Republican Women, Federated**  
**2021-current**

**Board Member**  
**Kids Tag Art**

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**Member**  
**Welfare Studies Committee**  
**Manpower Demonstration Research Corporation**  
**(1998-2000)**

Served on Welfare Studies Committee to review and provide consultation on reports on welfare research projects.

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**Member**  
**Advisory Board on Welfare Indicators**  
**U.S. Department of Health & Human Services**  
**(1995-1997)**

Appointed and confirmed by the U.S. Senate in 1995. The Advisory Board was created by the Welfare Indicators Act of 1994 to develop indicators of the rate, duration and dependency level of welfare recipients and to assess the data necessary to report annually on such indicators. Final report issued November, 1997.

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**AWARDS**

Wall of Fame  
University of Delaware  
2004

Executive Leadership Award  
Employee Involvement Association  
2003

Distinguished Service Award  
U.S. Department of Health & Human Services  
1985

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**EDUCATION**

B.A. University of Delaware, 1975

Health Economics Studies, 1980, Institute for Health Care Officials  
University of Miami

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**PERSONAL**

Married 38 years  
Son, age 35

