The Annie E. Casey Foundation and PathWaysPA bring you

Work Supports: Helping Families Reach Self-Sufficiency

A toolkit for community leaders to help them know and understand the many work support programs available in their community.

written by Marianne Bellesorte of PathWaysPA
TABLE OF CONTENTS

FOREWORD .................................................. PAGE 2

ACKNOWLEDGEMENTS ....................................... PAGE 3

HOW TO USE THIS GUIDE ................................ PAGE 3

SECTION 1 ................................................. PAGE 4
LEARNING THE FUNDAMENTALS:
WHY WORK SUPPORTS MATTER TO WORKING FAMILIES

SECTION 2 ................................................. PAGE 13
CHARTING YOUR COURSE:
THE SELECTION OF THE BEST METHOD FOR THE
ORGANIZATION AND COMMUNITY

SECTION 3 ................................................. PAGE 22
GETTING THE WORD OUT:
HOW TO ESTABLISH RELATIONSHIPS WITH COMMUNITY
MEMBERS AND ORGANIZATIONS

SECTION 4 ................................................. PAGE 32
TRACKING PROGRAM SUCCESS:
INSTRUMENTS TO MEASURE AND MONITOR SOCIAL IMPACT

SECTION 5 ................................................. PAGE 39
FINDING THE FUNDING:
FILLING THE NEEDS OF YOUR FUNDERS AND THE COMMUNITY

SECTION 6 ................................................. PAGE 44
SUSTAINING YOUR PROJECT:
HOW TO MAINTAIN, GROW, AND EXPAND

SECTION 7: ............................................... PAGE 48
MAKING POLICY WORK:
WHY YOU SHOULD GET INVOLVED IN PUBLIC POLICY

ENDNOTES .................................................. PAGE 56
FOREWARD

In a time where many more people are working and fewer families are receiving Temporary Assistance for Needy Families (TANF), there are still millions of children and parents who are hungry, lack medical coverage, and are detached from the economic mainstream in this country. For many Americans, earnings are not enough to escape economic vulnerability. Families are making hard choices—go to work, or stay home with a sick child and lose a job, pay the rent or buy food, use the hospital emergency room for routine medical care or pay for health insurance that you can't afford, fix your car to get to work or purchase a new one at a sub prime rate—because your medical debt has impacted your credit rating, you have no other option.

These scenarios play out in low-income communities across the country when earnings are not enough. Safety nets in the form of Medicaid, SCHIP, food stamps and child care subsidies can help families make up the structural difference between their living expenses and wages. Particularly in a sagging economy, work support programs combined with tax credits such as the Earned Income Tax Credit (EITC) and the refundable Child Tax Credit supplement working families’ low-wages, allowing them to continue to work and provide for their families when their incomes alone are not sufficient to do so. Yet a large percentage of families eligible for such services are not enrolled in these programs.

For the past few years, the Annie E. Casey Foundation has partnered with a number of communities and used those places as a testing ground for a neighborhood-based approach to increasing participation rates among low-income families eligible for food stamps, health care subsidies and child care subsidies. We had a hunch that, not unlike the Foundation’s Earned Income Tax Credit campaign, neighborhood campaigns designed to work with vulnerable families who are eligible for and open to enrolling in work supports could lead to increased participation in such programs. We saw work supports as an important element in workforce retention. We believed that any neighborhood-based effort had to intentionally address the culture of “no” that was inherent in so many of the public assistance programs. We knew that technology had to be part of the solution if we were to take on the issue of co-enrollment. Finally, we thought that if we could change the conversation from one of social service to one of financial service, maybe we could engage more people.

Over time, we’ve learned a few things about how to do this work. It is our hope that this toolkit, which represents hindsight for us, will be your 20/20. We certainly don’t claim to have it all figured out, so this toolkit is not a blueprint for replication or a comprehensive assessment of all the considerations involved in implementing a work support initiative. But it is our attempt to share with you what we wish we had known when we first considered taking on a neighborhood-based work support effort.

Bonnie L. Howard
Senior Associate
Annie E. Casey Foundation

Wendy Chun Hoon
Program Associate
Annie E. Casey Foundation
ACKNOWLEDGEMENTS

PathWaysPA would like to thank the Annie E. Casey Foundation for the opportunity to work on this guide. Without the foresight, expertise, and guidance of Bonnie Howard and Wendy Chun Hoon, this publication would not have been possible. We would also like to thank all of the organizations involved in working on this project. Special thanks also to Carol Goertzel, to Marianne Bellesorte for her writing and editing, and to Mary Spanburgh, Peggy Futch, Shelley Holmgren, and Lindsay Morgia for their contributions.

PathWaysPA began in 1978 as the Women's Association for Women's Alternatives, one of Pennsylvania’s first residential programs to keep low-income, vulnerable women together with their children. It has grown to become one of the Greater Philadelphia region’s foremost providers of residential and community-based services with a focus on serving women, teens and children. PathWaysPA also advocates for policy needs at the local, state, and national level. Each year PathWaysPA serves nearly 5,000 clients with a full complement of social services; job training and employment assistance; as well as residential programs. For more information, please visit www.PathWaysPA.org.

HOW TO USE THIS GUIDE

This guide offers nonprofit organizations helpful information on starting a work support program in their community.

If you are just beginning a program:

If you are just beginning a program, use this guide as a roadmap to your work. If you read through the guide section by section, you will learn what steps you need to take to create a work support program from the ground up.

If you already have a work support program:

If you already have a work support program but want some extra advice, feel free to skip around this guide to find the information you need. All of the information in this guide can be helpful to you, but if you only need to know about a specific topic, such as reaching out to legislators, just read that section.

Ready… or not?

At the end of each section, the “Ready...or not?” tool gives you the opportunity to assess whether or not you are ready to move on to the next section. This tool acts like a traffic light, with STOP, PROCEED WITH CAUTION, and GO! descriptions that help you determine what your organization is ready to do.

Tools You Can Use

At the end of each section is also a segment called “Tools You Can Use” that cites websites which might be helpful in learning more about each section.
SECTION 1:
LEARNING THE FUNDAMENTALS:
WHY WORK SUPPORTS MATTER TO WORKING FAMILIES

In this section, you will learn about:
• The needs of working families in the US
• The federal policies that affect working low-income families
• The impact of these policies on working families

After reading this section, you will be ready to:
• Research state and local policies affecting working families, including policies not covered here
• Determine the needs of working families in your region
• Locate others already involved in these policies

A: Working Families in the United States

Many Americans grow up believing in the American Dream – the dream promising that hard work, regardless of education, background, or other extenuating circumstances, can bring a good life to workers and their families. By working, families are assured an income that will provide food, clothing, housing, health insurance, and a variety of other needs.

Despite the promise that hard work will fulfill all their needs, millions of working families in the United States have found that they still go to bed hungry and worried, looking for ways to stretch their income to cover their needs. In the United States,
• 46% of all families living below the Federal Poverty Line (FPL) work
• 40% of all food stamp recipients live in a household with earnings
• 49% of working families have at least one parent without health insurance
• 77% of all uninsured children live in working families
• 11.6 million children under age 5 need childcare each year. Childcare for a four year old can cost on average between $3,016 and $9,628 per year.

B. The Impact of Federal Policies on Working Families

Recognizing that work doesn't always provide families with the tools they need to sustain themselves, the federal government has instituted policies known as "work supports." Federal work supports include programs like:
• The Earned Income Tax Credit (EITC)
  (http://www.irs.gov/individuals/article/0,,id=96406,00.html)
• Food Stamps/SNAP (http://www.fns.usda.gov/fsp/)
• The Low-Income Home Energy Assistance Program (LIHEAP) (http://www.acf.hhs.gov/programs/liheap/)
• Medicaid (http://www.cms.hhs.gov/MedicaidGenInfo/)
• The Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) (http://www.fns.usda.gov/wic/)
• The State Children’s Health Insurance Program (SCHIP) (http://www.cms.hhs.gov/LowCostHealthInsFamChild/)
• Subsidized Housing (http://www.hud.gov/funds/index.cfm)

This guide looks primarily at work support programs that enhance the purchasing power of low-income families, either monetarily or through providing services that offset basic expenses, such as food stamps that pay for food or energy credits that pay for utilities. However, many other work support programs exist that provide educational opportunities to low-income workers, giving them the ability to move ahead in their current career or to begin working in a new career path. These programs can be researched with the same techniques below, and generally will follow the same principles as those discussed in this guide.

C. How to Conduct Research
Several of the programs listed above will be discussed in this chapter. However, you may want to learn more about these or other programs that suit the needs of your community. Whether you prefer to research online, in the reference section of the library, or by talking to your community partners, here are a few things to keep in mind:

• Make sure you can trust your source to be accurate and reliable. Whether you are looking at a new website or talking to colleagues in the nonprofit world, you need to be able to rely on the information they give you. If you are not sure of the information you uncover, keep looking.

  o Some trustworthy sources:
  - www.aecf.org
  - www.brookings.org
  - www.cbpp.org
  - www.clasp.org
  - www.cvworkingfamilies.org
  - www.factfinder.census.gov
  - www.familiesusa.org
  - www.frac.org
  - www.kidscount.org
  - www.nccp.org
  - www.policymatters.us
  - www.sixstrategies.org
  - www.workingpoorfamilies.org
• Take the time to look hard for specific information (preferably based on your region of the country) rather than general data on the United States. You won’t always be able to find the information you want, but the search will be worth it, as it usually turns up a host of other data you wouldn’t have found. By finding strong statistics to back up your points, you will be able to convince more people of the needs of families in your community.

• Look for the most recent data you can find, preferably data published in the last three years. In many cases, you may only be able to find information that is five years and older, but newer data can give you a more accurate view of local and national needs.

• Keep track of all your research so that you can go back to a specific website or book to verify your findings. Often you will understand information when you write it down, only to have it make little sense a few weeks later. Taking careful notes of all your sources will also help when the time comes to cite your work.

D. Some Work Supports in Detail

Three common work support programs are the Earned Income Tax Credit (EITC), the Food Stamp Program, and the Low Income Home Energy Assistance Program (LIHEAP). These programs are available nationwide to low-income adults and families.

**Federal Earned Income Tax Credit (EITC)**

• **Description:** The Federal Earned Income Tax Credit (EITC) is a refundable tax credit offered primarily to low-income working families. Qualified families use the credit to pay some or all of their federal taxes, and receive any portion of the credit that is unused as part of their tax refund. This program is administered through the Internal Revenue Service (IRS).

• **History:** The Federal EITC began in 1975 as a program to help workers impacted by regressive payroll taxes by providing them with a tax credit. The federal government expanded the program many times, including in 1986, 1990, 1993, and 2001. It has grown to reach a large number of workers. In some cases, state governments have also enacted similar programs to allow workers to receive credits on their state taxes.

• **Scope:** In Tax Year 2006, $43.7 billion was distributed through the credit, an amount which reached over 22 million families. In Tax Year 2007 (all taxes filed in 2008 are for Tax Year 2007), the maximum credit available was:
  o $4,716 with two or more qualifying children;
  o $2,853 with one qualifying child;
  o $428 with no qualifying children.

• **Eligibility:** In addition to meeting other guidelines, in Tax Year 2007, earned income and adjusted gross income could be no more than:
• **Role of Non-profits:** Many non-profit organizations sponsor Volunteer Income Tax Assistance Sites (VITA sites) through which qualifying individuals can have their taxes prepared free of charge. In addition to providing an alternative to paid preparers (and to the predatory lending policies associated with these preparers), non-profit organizations can use this opportunity to help families learn about other services for which they may qualify. Non-profits may also advocate for policy changes in the program, such as increasing the number of families who are eligible to use the EITC. If a non-profit is interested in working on the EITC from an advocacy point of view, they may look to see if their state offers a refundable state Earned Income Tax Credit that applies to state taxes. Refundable credits allow families to receive money back from the government above what they paid in taxes: for instance, if a state offers a state EITC where the maximum refund amount is $1,000, a qualifying family can receive that refund even if they don’t owe any taxes. If the state only offers a nonrefundable state EITC, the family will not have to pay state taxes, but will not get a refund from the state either (beyond the money they have already paid in taxes).

**Food Stamp Program (To be renamed the Supplemental Nutrition Assistance Program or SNAP as of October 1, 2008)**

• **Description:** The Food Stamp Program provides low-income families with access to nutritious food in authorized retail stores and farmers’ markets nationwide. Eligible families receive food stamps through an Electronic Benefits Card (EBT), which is similar to a debit card. This program is administered through the United States Department of Agriculture (USDA).

• **History:** Since 1939, the federal government has provided food assistance in some form to needy families, beginning with the Depression-era Food Stamp Plan. The current model for the Food Stamp Program began in 1961, and became permanent in 1964. Additional changes occurred in 1977, and continue to occur with the renewal of the Farm Bill in 2008.

• **Scope:** On average, 25.7 million people received food stamps each month during fiscal year 2005. Half of all people using food stamps were children. Households received an average of $209 in benefits each month. The highest benefit available is $499 per month for a family of four; the lowest is $10 per month. On receiving food stamps, a household may purchase foods (or seeds from which to grow food) with their EBT card; they cannot purchase nonfood items, alcohol, cigarettes, or prepared food products.

• **Eligibility:** In addition to meeting other guidelines, a household qualified for food stamps in 2008 if they earned less than the monthly income below (before taxes):

  - $37,783 ($39,783 married filing jointly) with two or more qualifying children;
  - $33,241 ($35,241 married filing jointly) with one qualifying child;
  - $12,590 ($14,590 married filing jointly) with no qualifying children.
$1,107 for a family of one;
$1,484 for a family of two;
$1,861 for a family of three;
$2,238 for a family of four;
$2,615 for a family of five;
$2,992 for a family of six;
$3,369 for a family of seven;
$3,746 for a family of eight; and
$377 for each additional member.

• **Role of Non-profits:** Non-profit organizations may provide outreach to people who could qualify for food stamps to let them know that the program exists and is available to them. Organizations may also assist people in applying for food stamps by walking them through the prescreening and application procedure and working on their behalf to ensure the application is completed. Non-profits may also advocate for changes in policy regarding food stamps, such as raising the rate of monthly benefits.

**Low-Income Home Energy Assistance Program (LIHEAP)**

• **Description:** The Low-Income Home Energy Assistance Program (LIHEAP) is a block grant program that helps low-income homeowners and renters pay for their heating and cooling needs. This program prevents eligible energy consumers from suffering the effects of extreme outdoor temperatures. Program funds are disbursed based on a formula that takes into account cold weather conditions and the number of families living in poverty. In many states, LIHEAP is disbursed by Community Action Agencies (CAP’s).

• **History:** LIHEAP was included in the Omnibus Budget Reconciliation Act of 1981 as a program to assist families who spend a large proportion of their income on home energy bills. The impetus for LIHEAP came from the energy crisis in the 1970s, when more families began facing the choice between paying for food and paying for heat.

• **Scope:** LIHEAP can cover a large number of needs, including weatherization. However, most money is distributed through basic energy assistance and crisis assistance. In Fiscal Year 2007, $1.9 billion was appropriated from the federal government for LIHEAP.

• **Eligibility:** Eligibility for LIHEAP varies from state to state, as does the type of assistance and benefit level. To see information specific to your region, visit http://www.acf.hhs.gov/programs/liheap/consumer_information/index.html#apply.

• **Role of Non-profits:** While Community Action Agencies are often involved in LIHEAP programs, non-profits of all shapes and sizes can also take part. Eligible users need to be educated regarding LIHEAP’s benefits and often need help in
navigating the various components of the program. Non-profit organizations can also screen potential applicants. In addition, they can work on a policy level to bring more money to the program either from state or federal authorities.

E. Supporting Job Retention

In choosing the work supports that your organization wants to implement, be aware of the implications surrounding those supports, particularly in the ways they emphasize work for the people who use them. In work support programs, families lose access to some of the support or must pay more for it as they earn more money. Programs that gradually “phase out” by providing less and less support over time are more likely to encourage a family to continue working than programs that reach a “cliff” and dramatically decrease support at a certain income level.

• A “phase out” program is more likely to improve job retention because workers do not see a significant decrease in services for each dollar they earn. For instance, a public healthcare program could gradually increase their premium as a family earns more income until that family reaches a certain income level, which would be a “phase out.” The extra few dollars paid at each new level of income would not be high enough to deter a family from working more. Hopefully, the public benefits would end when families are paying approximately what they would for private healthcare, at which time they can purchase private care without drastically decreasing their income.

• However, in a “cliff” program, a family may actually be worse off when they earn more money, because the money they earn is not enough to pay for the benefits they lose. If the public healthcare program discussed above was available up to a certain level of income and then cost a steep price, it would be a “cliff.” Families would be less willing to earn slightly more income because they would lose so much in benefits.

All work support programs can be used successfully by families to reach self-sufficiency. However, when you are working with clients, you need to prepare them for the periods when they reach a benefits cliff.11 See the chart on the next page to learn more about work supports.
F. The Importance of Advocating for Work Supports

While it is easy to see the benefits of work supports for the people who use them each day, it is sometimes more difficult to understand why advocating for these supports at the state and federal level is so important.

If your organization does not have the time or ability to meet with legislative staff, you can still make your voice heard. By getting involved with larger umbrella groups that share your values, your organization can receive notification when important legislation is up for debate. These umbrella organizations often make it easy to send letters and faxes to legislators reminding them of the needs of your clients. However big the issue, no organization is too small to impact it. For more information on public policy techniques, read Section 7.

As you can see from the graph above, income decreases gradually when food stamps, EITC, and healthcare eligibility ends (a “phase out”), but decreases significantly when subsidized childcare ends (a “cliff”). While the family can quickly make up the income lost after food stamps or the EITC ends, it will be harder to make up the income to pay for childcare. Therefore, the family might be less willing to increase their earnings from $17 to $18/hour.

(Data gathered from PathWaysPA’s Online Budget Worksheet, which uses information from the Self-Sufficiency Standard to show how income matches up to a basic needs budget. This Standard measures family needs based on family size and ages as well as location.)

*Income Adequacy – Defined as the ability of income to meet expenses. Someone with 85% income adequacy only has enough income to meet 85% of their expenses.)
G. Why Your Organization Should Provide Work Supports

After reading all this, you might be thinking, “These work supports sound great, but why should our organization provide them? Can’t people sign up with a government agency directly?” They can, but signing up isn’t all that easy. Working people must often take time off from their jobs (usually with no pay) to wait in line and fill out complicated applications. Without the proper preparation, they may not even bring all of the correct paperwork with them. People often are embarrassed to go to the assistance office, and procrastinate or refuse to go entirely.

A non-profit organization can alleviate some of the stress of applying for work supports. Your staff can work one-on-one with a client at a convenient time to fill out the application and make sure all of the supporting documents are in order. You can also educate clients about the work supports available and what they need to apply for them. Under some circumstances, you may even be able to take applications over the phone, so that your clients won’t have to miss work. People are less embarrassed to ask a local organization for help, and are more likely to ask questions about their benefits.

Take the Next Step: Assess Your Readiness

Take the time to research the needs of your community as well as the various programs that are available to alleviate those needs. Here are some of questions to ask:

• What issues are apparent in this community? (for instance, lack of childcare)
• Do I know what causes these issues?
• What short-term solutions are available? What can be done in the long-term?
• What government program(s) best addresses either the cause of these problems or their side effects?
• What organizations are already working on these issues?

Ready… or not?

STOP: If you can’t answer more than two of the questions above OR if you don’t know what issues are prevalent in the community you are serving. Instead, spend some time learning more about your community and the organizations that are in it. Set up informational interviews with local organizations that serve low-income clients – they may be non-profits, religious organizations, or government institutions – to get a better picture of the needs in your community. You don’t want to go forward with a program until you know it is the right fit for you and the people you serve.

PROCEED WITH CAUTION: If you can answer most of the questions above, but you don’t know what solutions to pursue.
You are in a position where you can move forward and learn more about possible solutions as you go. However, your work support program will be better if you take the time now to learn more about what is available to low-income workers and their families.

GO!: If you can answer all of the questions above and you feel ready to move forward. The next step for you is to learn how your organization addresses the issues you see. To answer that question, please see Section 2, which will help you assess what methods will best help your organization implement a work support program.

Tools You Can Use

- [http://www.aecf.org/upload/publicationfiles/RF2022k556.xls](http://www.aecf.org/upload/publicationfiles/RF2022k556.xls) - An Excel Spreadsheet that estimates the cost of transportation on low-income workers, especially as it relates to finding affordable housing.
- [http://www.familiesusa.org/assets/pdfs/screening-manual/2_Background.pdf](http://www.familiesusa.org/assets/pdfs/screening-manual/2_Background.pdf) - This report shows where to get state-by-state information regarding Medicaid and SCHIP.
- [http://www.lasallenonprofitcenter.org/resources/useful_links.php#advocacy_activism](http://www.lasallenonprofitcenter.org/resources/useful_links.php#advocacy_activism) – The Nonprofit Center at LaSalle University has links related to advocacy and activism.
- [http://liheap.ncat.org/Directors/outreach/oudrover.htm](http://liheap.ncat.org/Directors/outreach/oudrover.htm) - This site contains outreach and enrollment strategies for LIHEAP.

**A FEW WORDS OF ADVICE**

“Understanding the needs of the community is important so that you are able to offer benefits that match the need of the community… Begin with reaching out to community based organizations and one-stop centers.”

– Chauncey Lennon, Seedco
SECTION 2:
CHARTING YOUR COURSE:
THE SELECTION OF THE BEST METHOD FOR THE ORGANIZATION AND COMMUNITY

In this section, you will learn about:
• The methods other organizations have used to provide work supports
• The selection of a methodology that supports your community’s needs
• The way to include what you have learned from other organizations into lessons already learned by your organization

After reading this section, you will be ready to:
• Examine the methodologies of organizations that currently provide work supports
• Implement your chosen methodologies or combination of methodologies
• Plan to track the outcomes of your work support program

Before beginning a program, it is important to set a clear course for yourself and your staff. The methodology acts as a road map that will allow anyone to navigate the potholes and detours that come up while running a program. Some organizations are better suited to utilizing technology, while others find their strength in their staff’s ability to reach out to the community. Every organization has skills that will allow them to take part in a work support program – creating a methodology can help you find the right combination.

A. What to Consider in Development of Your Methodology

Before you begin a work support program, you need to consider the community’s needs for work supports as well as the ability of your organization to meet those needs.

Determining the need: Since you have decided to offer a work support, it is likely that you have seen some needs in your community, at least anecdotally. To support what you have learned, examine any statistics that are available on people in need of work supports. While it is best to find local data to support your claim, you can also extract information from state or national data when necessary.

Example: You’ve noticed that your organization has referred more clients to the local food pantry in the past few months than usual.

• The first, and probably obvious, step is to talk to your clients to see why they are using the food pantry. Utility rates or health insurance costs may have in-
increased, there may have been a layoff at a local company, or perhaps more people have become aware of the food pantry services and are asking for referrals. Each reason uncovers something new, and shows different needs that work supports can meet.

**Going the extra mile:** Talk to the food pantry about what they are seeing, and to other community members. Their experiences will lend credence to the need for work supports in your community, and they may be willing to partner with you in offering those supports.

- **Once you have spoken to your clients and community partners, you can begin doing research into what the statistics have to say about the needs in your community.**

  - **One data point to determine is the number of people already receiving the chosen work support program in your community.** Examine the participation or take-up rate, which is the percentage of people who participate in a given program (like food stamps) when compared to everyone in the area who qualifies for it. If you are going to set up food stamp screenings, and 80% of the people in the community who are eligible for food stamps already have them, you may find it hard to connect with the people who still need them. That doesn’t mean that you shouldn’t try, but conduct more research before beginning that particular service so that you have a clear plan of action.

  - **The more local data you can find on this subject, the better:** a zip code or neighborhood assessment of income and work supports for the areas you plan to serve would be particularly helpful. These assessments let you see if there are particular locations most in need of work supports so that you can target your efforts to those areas. This data is also very hard to find. Many organizations rely on state or county-level data to tell their story.

    **Going the extra mile:** As you review the data, look for trends that are surprising or helpful in knowing more about your community. If food stamp use is decreasing among people using TANF, but increasing for people not using TANF, that may signal that more people on cash assistance don’t know about food stamps, or that people are eligible for cash assistance but don’t realize it, or something else entirely. See where the data takes you.

  - **If you cannot find specific data to explain what you are seeing, review national research on trends that affect communities like yours.** For instance, if your community includes many immigrant families, you can find research that details what supports people in those communities often need. Also, review your initial research again. Make sure that the problem is a lack of data, rather than data that disproves your theory about the work supports needed in the community.

**Meeting the need:** Once you have determined the need and found statistics to back up your claim, your organization can begin thinking of ways to offer services to the community. This step helps you begin to think about outreach and partnerships within the community.
Example: Your community includes many children in need of health insurance.

- Your organization might want to look into ways they can sign up children for healthcare.
- You should also consider whether setting up another program in the community, like Volunteer Income Tax Assistance (VITA) sites, will impact the need for health insurance.
  - If your community includes many low-income families with uninsured children, VITA sites might have an impact. These sites often attract low-income families with children, since they are the main target of the Earned Income Tax Credit. These families may be the same families who have uninsured children. While providing tax services, you can either screen families simultaneously for SCHIP or return to the same site after the tax season to conduct insurance screenings. (The Atlanta partner in this Guide, SEEDCO, along with many other organizations, found that families may not want to receive a work support at the same time they get their taxes done. Still, VITA sites provide an opportunity to build relationships with people that can later help them connect to other work supports.)
  - If someone else in the community already provides VITA and has saturated the market, or if most of the people who participate in the program do not have uninsured children, you might want to consider a different outreach mechanism. The important thing is to make sure that you have assessed the needs and chosen the right vehicle to meet them.

Going the extra mile: If you know someone already doing VITA sites in your community, talk to them about ways you can pair up to offer screenings to the same clients for food stamps, SCHIP, or other services during or after the tax season.

Organization and staff capacity: Choose a methodology that best fits your organization. Every organization should be ready to stretch and grow, but also able to take stock of what you have accomplished and what future goals are reasonable.

Example: Your office has very few computers, only one of which connects to the internet. Most work is done by phone or in person, and you often have members of your community coming in and out of the office.

- This office is not the place to begin a program that requires online prescreenings or applications. While you may consider setting up a mobile site using laptop computers, your organization also needs to think about the increased information technology workers needed to service the computers. Also, you would need to determine if your staff has the skill set needed for computer work, or if they would need additional training. For more information on technology and how it can help (or hurt), please see the end of this section.
- This office may be a great place to offer services that use paper screening forms and require working directly with clients, such as setting up a food stamp hotline or applying for food stamps with paper applications. Also, since commu-
Community members are often in your office, your staff will know their needs and the best ways to meet them. Community members can act as ambassadors for your program, whether on their own, as volunteers, or as paid staff. For more information on what community members can do, see Section 3.

**Example:** Your organization wants to start a program to register people for LIHEAP, but you only have one staff person available to run it. She is very excited about working with community members, but has no outreach or management experience. Meanwhile, the state has distributed an RFP (Request for Proposal) looking for someone to organize outreach services statewide.

- As a new program, this is not the time to apply. Your organization and staff should work out any problems in offering services before taking on a large number of clients.

- Your office sounds like a great candidate for offering services to a few neighborhoods or a section of a city. As you and your staff learn more about the program, and as you receive more funding and experience with outreach, you will be able to grow to reach more people. Set strong goals for yourself and your organization, but remember to keep them within reach. Most funders will be impressed if you can do more in a grant cycle than you plan on originally – it is harder to get more funding if you do less than you intended.

**Linkages with other organizations and agencies:** As you create a work support program, you should be mindful of the other organizations working with the same client population who might be willing to help. You should also think about the government agencies that make decisions on the work support programs: they may be more helpful than you think.

**Example:** Your organization has begun registering people for food stamps, but has run into many problems along the way. It is hard to find people who are willing to sign up for food stamps, and when you do find them, the process is long and drawn out. Plus, once you send in the application, you don’t have a system in place to find out if people received benefits.

- You might want to begin by looking at other groups who work with people in need of food. Food pantries are a perfect place to start, as well as organizations that provide clothing and furniture to low-income people. You may also want to visit your local senior centers, both to see if low-income seniors are in need of food stamps and to ask if some of the more active seniors would like to volunteer with your program.

- When dealing with a long, drawn-out process, it often helps to go to the source: the agency that looks at the final application. People in the agency will be able to tell you how to ensure the application is processed quickly and efficiently, what shortcuts are available to people filling out the application, and even when
it is best to submit an application. As you work closely with an agency, you may even be able to link directly to their online application system, ensuring easier tracking, or find someone willing to let you know how many of your clients received benefits. As Kingsley House in Louisiana learned, working with local agencies also provides them with an opportunity to see new forms and policy updates right away, and to offer feedback on how these changes might affect clients. “It would be great for others starting up to know that local food stamp offices should be involved in planning,” says Luanne Francis, Program Manager for Health Care for All at Kingsley House. “We have established a work group that consists of staff from the local offices and key staff from state and regional offices that meets at least quarterly.” This group checks in on issues ranging from work status to policy changes and feedback.

- In addition to working with the agency to see who received benefits, your work support program should have a system to follow-up with clients after they apply. Clients who received benefits will be happy to tell you the news, while those who have been rejected may be too embarrassed or shy to call you to ask for help. Some applicants may not be able to understand the documents sent to them from the work support agency, but again might not be willing to call to ask for help. Try to find a simple method of outreach that works well for your client base and for your staff: phone calls, emails, and even postcards are ways that you can stay in touch.

B. Learning From Your Organization's Past

When you are preparing to take on a new program, remember the lessons your organization has learned in other projects, as well as any cautionary tales passed on to you by other organizations. Don’t let these lessons prevent you from taking action, however: just because your organization made little progress in signing up children for free school lunches a few years ago doesn’t mean you can’t do it now. Determine what went wrong in the past: Poor planning? Little advertising? Untrained staff? Bad luck? In most cases, you can counteract these problems with some preparation.

Example: Five years ago, your organization decided to start a work support program. However, soon after the program began, the executive director, who had extensive knowledge of work supports, moved on to another organization. Meanwhile, staff became overwhelmed with other projects, and could not get the work supports project off the ground. At the end of the year, you made a final attempt to sign people up by bringing applications to a community block party. Unfortunately, it rained, and the community canceled the party.

- Loss of key staff: This is one of many reasons to plan your program before starting. Non-profits often experience turnover, and it is important to have procedures in place for when that happens. Even if you know your staff will be there to see the project through, you cannot predict when a key person might leave because a spouse has a new job opportunity, an adoption means a parent
needs a more flexible work schedule, or a family member becomes ill. Setting up a plan and putting it in writing means that if a staff person moves on, you still have a map to follow as the program continues.

• Prioritizing projects: A work support program (or any ongoing program) will never feel as urgent as the day-to-day emergencies that crop up in your organization – that is, until the end of the grant period draws near with only a few applications completed. It is important to meet regularly about the project and to set short-term goals to ensure you meet the long-term objectives.

• Weather and other extenuating circumstances: This part of the story sounds like a case of bad luck. The easy solution: Don’t leave things until the last minute. The other solution? Invest in tents for outdoor events or have another backup.

When you examine past history, there may be some issues you cannot overcome. If your organization is dedicated to helping low-income workers but is physically located in a high-income area, the population you want to serve may not be able to come to you for help. While you need to examine creative ways to reach the population (For instance, do low-income workers travel to your area to provide services in the neighborhood? Could you offer mobile sites outside your district?), you should think about whether or not work supports are right for your organization.

C. Selecting a Methodology

In the Methodology Attachment of this Guide, you will find a questionnaire on work supports. As you continue researching and talking to other organizations, keep these questions in mind. Ask these questions of other successful (or not so successful) work support programs, and ask them of yourself. While you might not have all the answers now, these questions will help you chart a path for where to go next.

Take the Next Step: Assess Your Readiness

Now that you have read through this section, think more about the services you want to provide and the best plan for providing them. Use the worksheet provided in the Implementation and the Methodology Attachments to think about the questions and answers that might help you come to this plan.

Ready… or not?

STOP: If you can’t answer the questions in the Implementation Attachment regarding the community or how your program fits into your organizational mission.

Before moving forward, you need to ensure that the program fits with the overall goals of your organization and the needs of the community. Work supports may not be the right choice for everyone. Some communities may have needs that
cannot be met by traditional work supports— for instance, families may not be able to make ends meet, but may still earn too much for food stamps. Similarly, some organizations may care deeply about the needs of low-income clients but lack the time, resources, or mission to address those needs.

**PROCEED WITH CAUTION:** If you have not determined how to staff your program OR if you have not utilized the Methodology Attachment.

It is alright if you can't answer every question right away, especially those in the Methodology Attachment. Some questions were designed to be answered as your program grows rather than in its early stages. However, you shouldn't begin without knowing how to staff your program OR without talking to other organizations about their programs. It is important to have a plan in place before moving forward.

**GO!:** If you can answer most of the questions in the Implementation and the Methodology Attachments and you feel ready to move forward.

You don’t need to have every answer to move on, but you do need to know the basics. Some things, like developing a database, might not happen until you have funding for the program. As long as you have talked to other organizations and have assessed the abilities of your workplace (and, of course, decided that work supports are right for your community and your organization) then you can move forward to begin thinking about how you will reach out to community members and other groups to join with you. Are you wondering what steps you should take? Please read Section 3 to learn more.

**Using Technology Offsite**

Many organizations use **mobile sites**, which can move from place to place depending on the need of the organization. For instance, you might set up a mobile site at a local childcare center to screen applicants for food stamps for one afternoon. If you are interested in mobile sites, make sure you get the documentation you need to run them. The IRS, for instance, might require a special type of tax ID number. Also, if you will be using someone else’s office as a mobile site, determine ahead of time who will bear expenses such as using the copy machine or computers. Here are some of options to investigate if you choose to use mobile sites for work supports:

**Laptops:** Staff can take laptops to other locations, including the client’s home, with relative ease. Clients and staff can fill out paperwork and save it on the laptop to print later at the office or to send via internet to the appropriate parties.

- **Benefits of laptops:** Laptops are portable and can be lightweight. They also fit a large amount of data in a small space.
- **Downsides of laptops:** If you plan to use the laptops for more than two hours, make sure you have access to electricity. In addition, if you need online services to access work supports, be sure you will have access to the internet at your mobile sites.
**Portable printers:** If applying for a work support requires clients to sign forms in person, bringing a printer with you to sites will help the client apply more quickly for the service.

- Benefits of printers: Printers ensure that clients who apply in person can sign their paperwork on the spot. They also allow clients to take copies of their applications home for their files, which is particularly helpful when conducting mobile VITA sites.
- Downsides of printers: Printers may be heavy and awkward to carry – be sure to think about where you will be taking them (and how you will get there!) before purchasing them. Printing out private information may also require that staff keep the printed documents in a secure place and invest in a shredder to protect sensitive items.

**Wireless internet cards:** While most laptops include built-in wireless modems, not all mobile sites will make wireless internet access available. Wireless internet cards are available through many internet providers and allow you to access the internet anywhere. Be prepared: in addition to start-up costs, most companies charge a monthly fee for service.

- Benefits of wireless internet cards: These cards allow access virtually anywhere, which is helpful for mobile sites or when working in a client’s home. They also provide service while on a train or bus, which will let you catch up on work while in transit.
- Downsides of wireless internet cards: These cards can be expensive. Price the costs of competing plans before buying. Remember, just as some cell phone providers don’t have coverage in certain locations, wireless cards may not work everywhere. Check coverage information and see if you can try out the card before purchasing.

**Scanners:** Scanners allow you to make copies of all relevant documentation while with a client instead of asking the client to make copies separately or being responsible for the safekeeping of important documents such as birth certificates. Portable scanners are available – some as small as a pen – which can hold on to the information needed.

- Benefits of scanners: With scanners, you can immediately copy the client’s information and save it to a file.
- Downsides of scanners: As some organizations have learned, the technology doesn’t always work when you need it to. For instance, the Oakland partner group quickly realized that scanners weren’t effective in mobile sites that had no access to electricity. As with any resources you use for your services, always make sure you have a backup plan. In Oakland, the group found a type of power cord that would let them connect the scanner to a laptop computer, drawing on its battery power.

**Cell Phones:** Your staff may already have cell phones for personal use, but if they use them often enough as part of their work, you may want to invest in company cell phones or find a way to reimburse staff for some of their costs.
• Benefits of cell phones: Cell phones can be useful to communicate with the main office while working at outreach sites.
• Downsides of cell phones: Your organization may find it difficult to develop a fair system for allocating company cell phones or reimbursing staff when they need to use their personal cell phones for company business.

General warnings on electronic equipment: When your staff begins using equipment, set up a reservation mechanism ahead of time. Ideally, your staff will already be aware of when appointments and events are scheduled, but having this system creates a second chance to check in with each other. Also, make sure that you have insured the equipment and/or made those using the equipment responsible for doing so properly and returning it.

Tools You Can Use

• http://www.lasallenonprofitcenter.org/resources/useful_links.php#tech – The Nonprofit Center at LaSalle University has a list of links related to technology.
• www.myfoodstamps.org – This site includes a screening tool and food stamp database software.
• www.policymap.org - Policy Map is a national mapping tool that provides maps, tables, charts and reports based on the information that users request.

A FEW WORDS OF ADVICE

“Start with the local folks and work your way up. Attend meetings and events to see who is doing what and to give yourself some face time. Seek input from those who will be involved and affected by the program.”

– Luanne Francis, Health Care for All
SECTION 3:
GETTING THE WORD OUT: HOW TO ESTABLISH RELATIONSHIPS WITH COMMUNITY MEMBERS AND ORGANIZATIONS

In this section, you will learn about:
- The need to build public awareness about your work support program in the community
- The ways the news media can help get your message to the public
- The importance of building private and public partnerships

After reading this section, you will be ready to:
- Establish relationships with key stakeholders and staff
- Use your timeline as a tool to implement your project
- Build institutional capacity to pursue public and private resources

In the early days of building a program, it often seems that “getting the word out” will be easy: a few emails here, a nice story in the paper there, and people will be knocking down the door. Most organizations aren’t so lucky. It takes time, determination, and a consistent plan to penetrate the public consciousness and let people know that the services you provide might actually help them, not just other people in the community. By establishing relationships, you can get the word out that much faster.

A. Community Outreach

Maintaining a work support program often depends on how visible your organization is within the community. Engaging constituents through your outreach efforts and providing services that meet the community’s need will help build the sustainability of your program. Consider the following questions when developing your outreach plan:

What role do you want the community to have in your program?

- Work support programs partner with the target community in many ways. They can be active participants, referral sources, or simply your client base for a particular service. In creating your outreach plan, the community will play an important role in the delivery of service. Many work support programs utilize community members as paid or volunteer staff who can use their contacts and community involvement to recruit and provide screenings or application assistance for work supports. Ensure that any staff involved in the work support program, particularly those handling sensitive documents, receives training on privacy rules and regulations.
What language or cultural practices are present within your target community?

- The staff of your work support program should be aware of language or cultural norms within the target community. If the population you are working with does not use English as a first language, your outreach materials should utilize the population’s native language whenever possible. You may also want to engage bilingual or multilingual staff or volunteers to outreach to these communities directly. The Oakland group, for instance, hired bilingual, bicultural outreach workers to distribute information that was appropriate to the communities in which they worked.

How is information disseminated to the community (through church, radio, local newspaper, word of mouth, etc.)?

- Along with language and culture, a work support program needs to be in tune with how community members communicate with each other. For the program to grow, staff members in a work support program need to know how to market the program. Many programs have found success through trial and error. For instance, one Seattle group based their outreach on local leaders and the existing social networks in their communities. They invited trusted area leaders to create an outreach pilot program for their community.

- Whatever methods you choose, tailor outreach materials based on the geographic location of your program and on the locations where you chose to do outreach. Never underestimate the power of personal contact – even in the largest areas, door-to-door outreach may be most effective at breaking down barriers and helping families avoid the expense of transportation or the time spent in long lines. One key to door-to-door outreach? Make sure someone stays back in the office to help everyone coordinate and to answer questions from families calling in for appointments. “We modified our door-to-door outreach such that one Walker/Talker remains on site at Kingsley House to assist families who find out about us and call for appointments,” says Luanne Francis, Program Manager at Kingsley House. “We developed a schedule for the Walkers/Talkers so that they know who is on site when and who is out in the field.”

Going the extra mile: Whatever outreach method you choose, make sure you include a simple but effective message on what a client needs in order to get services. For instance, if you plan to help clients sign up for food stamps, in most cases they will need to bring a form of identification, a Social Security number, and proof of income and expenses, including medical needs. Preparing a client ahead of time allows the client to feel more comfortable with the process and its requirements, and ensures that clients are ready for screenings the first time around. Samples are available in the Flyers attachment.
B. Media Messaging

Client outreach can take many forms depending on the geographic and demographic data of the target community. Choosing the right materials (flyers, mailings, etc) and methodologies (door to door canvassing, radio, etc) will be an important part of engaging and sustaining participation in your program. Whatever method you choose, it is important to analyze the characteristics of your target community and the media they use. Talk to clients and potential clients to learn how they heard about you and what media they rely on for information.

Building community support for your work support program can happen through media messaging as well as through outreach materials directly disseminated to the community. Press releases and public service announcements are an important part of increasing support for your program. Press releases give organizations the opportunity to highlight their success or spotlight a need in the community. They offer a work support program the chance to display their successes and highlight the accessibility of their services. For example, community members might think that food stamps are only for the unemployed, or that people working forty hours/week could not qualify. If you find this myth is prevalent, write a press release using a success story from one of your clients who works full-time but qualifies for food stamps.

While you may feel that writing a press release and gathering a media list is too daunting a task for your organization, it is often an easier task than you think.

Writing a press release: To write a good press release, you need to be excited about your subject. Even if you are writing about a program that you have run for twenty years, or an issue that is so boring you keep falling asleep at your computer, remind yourself of why the issue is important. What makes the program so successful? Why does it matter if a certain bill is passed? If you don’t know the answers to these questions, then maybe the press release shouldn’t be written at all. But if you do know the answer, go ahead and write, and keep in mind the following:

- Media Interest: Think about what angle you can take that will make the news media interested in what you have to say. Is your topic exciting or interesting? Does it play a role in an upcoming event or holiday?
  - Incorporate national issues: Many local news organizations are interested in featuring stories that show how a national issue plays out at home, so consider how your organization’s work impacts issues discussed in the presidential campaign, for instance, or in other big news.
  - Refer to upcoming events: Time your release for an upcoming event, anniversary, holiday, or time of year – for instance, if you are offering food stamps, “back to school” is a great time to talk about free and reduced price breakfasts and lunches.
  - Include information relevant to pop culture: Don’t be afraid to relate your story to pop culture: it will stand out from the crowd when it comes time for an editor to look it over.
• Headline: Some writers prefer to write the headline after they have written the release; others like to write it before anything else. Whichever you choose, make sure your headline is catchy and exciting.
  o Highlight what is interesting: Take whatever is fascinating in your release and use that in your headline.
  o Rely on keywords: Using the keywords from the body of your report is also helpful: if your press release is about the use of food stamps by older adults, be sure to include “hunger” and “elderly” (or a similar word) in your headline.
  o Draw people’s attention: Make the headline a larger font than the rest of the release.

• First paragraph: It sounds clichéd, but a press release needs the “who, what, where, when, how, why” format. In fact, the whole release should be written as a newspaper article.
  o Move your information to the front: Make sure that your first paragraph is catchy, but also that it includes all of the important points. You can elaborate on that information as you continue the release. Think of the beginning paragraph as a summary to the rest. Sometimes newspapers will cut off the end of a press release to fit space constraints, which is why it is especially important to have information up front.
  o Write what you want published: Some news organizations will take the release verbatim and use it as an article. Be sure to include everything you want the public to know – don’t expect that reporters will call you back for more details (although hopefully they will).

• Body: The body of a press release ideally should include short paragraphs and a few quotes from a client, staff person, or elected official.
  o Use quotes to promote: Your quote should say something you can’t write in the body of the press release, such as “Food stamps have been a lifeline for my family. We don’t have to choose between food and heat anymore. Plus, my daughter is getting good grades now that she has enough to eat.” If you just wrote this in the press release, it would sound contrived, and would lose the connection with a real family’s struggle. Writing, “The families we serve can afford both food and heating,” doesn’t bring the same energy to the story.
  o Avoid using boring material in quotes: For instance, don’t use a quote to say, “We hope people will call us to see if they qualify.” That is simple information – write it in the body as: Interested? Call today to see if you qualify!

• Ending: Your press release should end with information about how to contact you and the takeaway points you want people to remember. The very last line should have three # signs (###) to signal the end of the release.

• Sending your press release: Most organizations send press releases by email,
although some choose to send by fax or other methods. However, email costs less (to both you and your media targets) and is easier to convert into text for an article – all a writer needs to do is copy and paste. The easier a release is to use, the more likely it will be used by a writer or editor.


Creating a media list: Once you have your press release, you need to know where to send it. This part of interacting with the press can be frustrating – you may send out release after release and get no response. The trick is to be persistent, to continue honing your media list, and to continue working on your writing skills. You will get some interest eventually.

- A good list includes print media, radio, TV, and blogs or other websites.
  - Include diverse targets: Be sure to include local newspapers and regional ones, as well as the small radio stations and community access TV. It is tempting to aim for Oprah, but you are more likely to get coverage from local sources than you are from larger entities.
  - Find interested writers: You should look for people who are interested in the topics that you write about. Someone who writes about legislative affairs might prefer to receive a press release on a recent change in the Farm Bill than information on a recent fundraiser.

- Starting your list: Begin by finding a few recent articles on relevant topics. Find out who wrote them and how to get in touch, and you have a media list!
  - Update your list daily: When you catch up on the news each day, make note of the names and contact information of any authors who write about your topics. Each time you send out a new press release, add these authors plus at least five to ten new names, and soon you will have a good-sized list from which to work.
  - Include legislative contacts: Many organizations include their legislators as part of their media list. This choice keeps legislators informed of your organization’s position on a certain issue, and reminds them of the relationship you have with the media.
  - Try to send your press releases to a variety of news sources: those that will be trusted by politicians, clients, advocates, and others. While you may have a certain newspaper or radio station you are partial to, you might not share the same interests as the people you want to reach.

- Organizing your list: Your media list should be a database of pertinent information, including the counties covered by a newspaper and the issues a reporter covers. As the media list grows, these categories will help to send targeted press releases to the people most interested in your issue.
- Other services: You may also choose to invest in a “newswire” service, which
will send out your release to a certain list of reporters and often will post the release online. While an internet posting might bring more attention to your work, ensure that the news releases will reach the reporters that matter to you before you purchase a newswire service. If your organization is a small nonprofit serving one county in a rural area, a service sending your press releases nationwide may not be helpful in getting your message across. If you want your press release online but a newswire isn't practical, you can always post it to your website.

**Going the extra mile:** Try to build personal relationships with some of the writers on your media list by checking in with them to see how they prefer to receive a press release (via email, fax, etc.) and what topics they want to cover. As you build a relationship with them, they are more likely to keep an eye out for your releases and to come to you when they are looking for a story. In general, journalists will be more likely to read your release if they receive it personally (not as part of a “blast” email) and/or if you call to talk to them.

**Op-eds and Letters to the Editor:** These are other forms of media outreach.

- An op-ed is an essay, usually on an important topic of the day. Op-eds range in length from 400-800 words, but each newspaper has its own requirements, so you should check with the newspaper before writing. (Op-eds usually appear in newspapers, but there are video and audio versions depending on the medium you choose.)

- A letter to the editor is much shorter, usually under 250 words, and responds to an article or an event.

- How to write: In both cases, start with the main reason you are writing, composed in a catchy way. Don’t wait until the end of the essay to say that you support a program or disapprove of a bill: say it right up front, and spend the rest of the page explaining why. This will make people more likely to read and respond to what you have to say.

  o Invoke your views: Unlike a press release, which should stick mainly to the facts, op-eds and letters to the editor are your opinion. That means that while you shouldn’t lie, you can include more of your personal feelings in whatever you write.

- How to submit: Most newspapers will accept letters to the editor unsolicited—that is, you don’t need to ask their permission to send one in. Op-eds are a different matter—some news organizations prefer to ask for an essay rather than receive one without warning. Again, check the requirements of the news organization you plan to send the op-ed to, and try to talk to someone in person if you have any questions.
C. Choosing Words Wisely

When you speak to anyone, including the news media, about issues relating to low-income people, the words you choose are very important. The connotation of the words “We want to help poor people by getting benefits for them” is very different from “We are providing opportunities for the working poor to keep more of the money they earn.”

To really get the point across about work supports – to show that they are not “welfare” but ways for people who work to support themselves – you need to know how best to tell that story. Phrases such as “making opportunities equal” and “rewarding work” are two ways of telling people that your programs are effective in letting clients help themselves become self-sufficient. For more ways to talk about these issues, look at the tools at the end of this section.

D. Developing Public and Private Partnerships With Other Groups

Building partnerships is an important part of a successful work support program. In the initial phases of your program, it will be important to establish relationships with those organizations and agencies that have a similar mission and vision. Developing public and private partnerships is a key step in beginning and sustaining a work support program. Government agencies and community based organizations (CBOs) have access to resources that could be beneficial to your work support program, such as space available for outreach or people to serve as volunteers. While some of these organizations may offer similar services to yours, it is important to work with them as partners in a greater vision to reward work rather than to perceive them as competition for clients, funding, or recognition.

As you initiate relationships with other organizations, it is important to think about your goal in building the relationship. In some cases, building a relationship will help you find the resources to perform outreach or recruit volunteers. In other cases, these relationships can lead to advocacy partners that will help you create a larger presence when working with government entities. Two or more organizations working together can sometimes achieve more than they could while working on their own, and they may also gain more credibility by doing so. By creating a “community results agenda,” in which several organizations come together to work for what is best for the area, groups have a greater chance of being heard. These coalitions also appeal to funders, who like to know that their funding supports organizations that work with each other for the common good. If your organization joins a coalition or partners with another organization, it is important to determine what services you can offer as part of the relationship – for instance, you can leverage your preexisting government contacts to help a grassroots operation that has strong outreach skills.

Utilizing contacts is an important first step in building relationships with other government and community agencies. A trusted contact can help organize a meeting between the two parties, explain the specifics of the work support program, and demonstrate how working together can be mutually beneficial for both agencies. If
you do not have a contact within a potential partner organization, it is important to
gather information about key staff people. For instance, if you are looking to start a
program to help increase enrollment in a state children’s health insurance program,
find the contact information for the outreach coordinator or project manager at an or-
ganization engaging in a similar effort. You can usually find this information by search-
ing on the organization’s website, calling the organization itself, or by asking
colleagues who have worked with the organization on other projects in the past. Your
board members may also be able to recommend agencies for you to collaborate with.

Once you determine who the key staff members are, contact them via phone, email or
a personal letter. Explain your organization’s mission and your work support program,
share current successes, and tell why your program would like to collaborate with
theirs. Be sure to include your contact information and invite them to schedule a face-
to-face meeting to discuss actions you can take to build a mutually beneficial relation-
ship. You may also want to schedule a larger meeting to bring all of the potential
partner organizations together at one time.

When meeting in person with new partners, brainstorm ideas as to how your agencies
can work together to benefit the community. The following is a list of different types of
partners and suggestions as to how you can work together:

- **Government agency** (County Assistance Office, Department of Public Welfare,
one-stop career centers, etc.): Asking government agencies for space to do out-
reach can be beneficial for both partners. It will help your organization reach
more clients while easing the workload of government agencies and allowing
them to provide a valuable benefit to their constituents.

- **Community organizations**: Community organizations can share space for out-
reach, plan events together, or use each other for referrals in order to reach out
to more clients. They can also use their respective contacts to connect each
other to additional agencies.

- **Community members**: Community members can be great as volunteers, out-
reach members, or other staff positions. Many will be interested in creating a
better place for their families to live. Community members are also a valuable
source of information regarding “what works” in the neighborhood. As key
stakeholders in your work, they have a vested interest in the activities that your
organization provides. Community members can also play important roles on
your board or as project planners, and can add credibility to your work.

- **Employers**: Employers who hire a significant proportion of low-income individu-
als can also be a great resource when looking for potential clients. They may
be difficult to approach – clearly your organization should not visit an employer
and say, “Since you don’t pay your employees enough, we want to make sure
they have food stamps.” Instead, your organization can present food stamp or
healthcare screenings as free benefits that an employer can extend to their low-
wage workforce. You can do outreach onsite at their companies during lunch or
break times, and the employers can tout this as a perk when recruiting for new employees. (Once you are in the door, you may be able to work with employers to show them how to provide educational opportunities and career ladders for their employees, but that is a topic for another day.)

Going the extra mile: As you make contacts with different organizations, you may want to create an agreement that sets out the terms of your work together. To do this, your organization should consider entering into a Memorandum of Understanding, which defines the type of work agreed upon, when and how it will be done, and when it will start. This Memorandum can be set to take effect only when funding is made available, which will allow you to make preliminary agreements that you can then show to funders as proof of your planned work. A sample Memorandum of Understanding is located in the attachments to this guide.

Take the Next Step: Assess Your Readiness

Now that you have read this section, you should be ready to think about community norms and how they affect the needs your clients face. You should also be thinking about other organizations who serve those needs, both successfully and not so successfully. As you learn more about these organizations, you might also want to keep a list of their ideas that appeal to you.

Ready… or not?

STOP: If you don’t know the best ways to reach out to members of your community. You don’t need to know everything – for instance, it may take time to discover the right mix of outreach for your community. But if you don’t have some sense how to work with clients or who is most trusted in the community, then you should stop and rethink how best to move forward.

PROCEED WITH CAUTION: If you don’t feel that your organization is ready to reach out to the news media or other groups. An organization can run a successful work support program without referrals from other groups and without news coverage – but it is hard to do. Don’t assume that you can move forward at this point and still reach all of the people in your community who could benefit from a work support program. Writing a press release or contacting other organizations may seem like a daunting task (especially if all you hear at first is “no”) but with practice and patience it will get easier.

GO!: If you feel confident in how best to reach out to the community and the news media, and if you have begun making contacts with other organizations. If you are at this point, then you are ready to go on. Just be sure to continue developing contacts and to revisit your outreach method to see what works best once you are out in the field. To keep track of what works, your organization should know about outcome measurement. Outcome measurement is important in learning how effective your program is, and in proving its effectiveness to
current and potential funders. How will you measure your outcomes? In Section 4, you will learn more about outcome measurement and choosing a method for your organization.

Tools You Can Use

- [http://www.ehow.com/how_2191469_create-media-list.html](http://www.ehow.com/how_2191469_create-media-list.html) - This page goes into more detail about the creation of a media list.
- [http://www.frameworksinstitute.org](http://www.frameworksinstitute.org) – This site helps show how to frame different issues when discussing them with the news media or other entities.
- [http://www.inclusionist.org](http://www.inclusionist.org) – This site includes information on how to talk about low-income issues, as well as research on better jobs and improvements to low-wage work.
- [http://www.lasallenonprofitcenter.org/resources/useful_links.php#comm-marketing](http://www.lasallenonprofitcenter.org/resources/useful_links.php#comm-marketing) - The Nonprofit Center at LaSalle University has a list of links related to marketing.
- [http://www.financeproject.org](http://www.financeproject.org) – A non-profit that works to help other leaders make decisions whose website includes a report on reaching out to employers.

ONE ORGANIZATION’S STORY

PathWaysPA, a non-profit serving women and families to help them to reach self-sufficiency, learned firsthand the value of targeting press releases to what was currently going on in the community, region or country as a whole. One example came with the circulation of a press release educating the public about food stamps related to “Back to School.”

This press release made parents aware of the free- and reduced-price breakfasts and lunches that might be available to their children. Almost every story published during the end of August and the beginning of September involved school, the return to school, or school supplies. The interest in school encouraged a major radio station to interview PathWaysPA at a time when not many people were thinking about food stamps.

Having a relevant angle allowed PathWaysPA to slip in information about the food stamp program and target the audience that would be most likely to be eligible but not know it – families working full-time with young children. This press release plus “back-to-school outreach” (such as distributing flyers to local schools) led to an 8% increase in food stamp screenings.

– PathWaysPA, Holmes, PA
SECTION 4: TRACKING PROGRAM SUCCESS: INSTRUMENTS TO MEASURE AND MONITOR SOCIAL IMPACT

In this section, you will learn about:
- The importance of measuring and monitoring the impact of your program
- The different ways to track this impact
- The variety of tracking instruments available to you

After reading this section, you will be ready to:
- Set goals for delivery of services in your community
- Choose an evaluation method and an instrument to measure and monitor your program’s performance
- Develop a project timeline to implement your work support program

There are many ways to define success. Individuals, for instance, might raise $1,000 for their favorite non-profit and consider themselves successful (and rightly so). That same organization might consider reaching an overall fundraising goal of $25,000 a success, or they might have higher or lower standards.

The same is true with work supports. Depending on the size and mission of the organization and the work support program they choose, the definition of success will vary from one program to another. So will the appropriate measures of success.

A. Quantitative and Qualitative Measurements

Programs seeking to undertake work support outreach and assistance must be able to demonstrate the impact of their work to funders as well as policymakers. They need to respond to funders – whether from the public, private or philanthropic sectors – who want to understand how their financial support translates into benefits for the targeted community. Impact data will also be critical to expanding the possible pool of resources to support your work. This data can help policymakers – regardless of their political affiliation – to support policies that affect working low-income families. Understanding the degree of social impact resulting from outreach efforts is also critical as you set priorities and define the scope of services.

In your program, you might choose to measure any of the following:
- The number of children in families receiving food stamps
- The amount of people you serve who are below the poverty line
- The length of time people were without healthcare before signing up with your program
A common theme emerges throughout the list of measurements in the opening paragraphs: a number value applies to each measurement. How many children are in a family receiving food stamps? **Three** children receive food stamps in the average family (in this imagined program). In the same program, **25** people served are below the poverty line; an individual has gone 6 months without healthcare. Using numbers is an example of **quantitative** measurements, and they are the types of measurements you should rely on most with your programs. These measurements show the effectiveness of the measurable outcomes in your program.

While **qualitative** measurements, or measurements relying more on subjective qualities than on data, are also important, they will not carry the same weight with a funder as a quantitative measurement. Qualitative measurements show the direct impact that a program has on a target audience in a way that cannot be measured by numbers. If you can report anecdotally that families have more money to purchase clothes for their children, that would be a qualitative measurement. The ideal, of course, is to combine the two types of information, so that the funder will hear both. One way to achieve this combination is by tracking quantitative data and holding a focus group with some of your clients to gather qualitative data in order to gauge your success.

As Wendy Chun-Hoon of the Annie E. Casey Foundation points out, data is needed in cases “where work supports were the ‘make or break’ in retaining a job. The power of community based organizations doing the work is that they’re close enough to the people to hear and record these stories.” Knowing how often work supports allow a family to keep a job or avoid homelessness, for example, allows researchers to determine the importance of work supports to low-income families, yet this knowledge is almost impossible to determine from a set of numbers. Many organizations also find that, even though they need numbers to back up their work, it is the impact of a client’s story that gains attention. Tracking this data can be as simple as asking every family you work with to fill out a “success story” worksheet (see the Appendix for an example) or as sophisticated as creating a video blog where families tell their story online. Whatever path you choose, be sure to ask permission from the families to use their stories, and review the stories often so they are fresh in your mind when you need to tell them.

As you look at measurements, some aspects of your work will be hard to assess, but will be important to your funders and to you. When something is hard to measure, look for an **indicator**, or another way you can tell what is going on. For instance, you may want to know if the state-supported healthcare program is actually helping school-age children. Without delving into their medical records, it might be hard to tell the results. A simple way of tracking success would be to work with families to find out how many days of school their children miss due to illness. If they miss fewer days, then the program might correlate with increased health. If they are still missing the same number of days or more days, then it is time to examine the situation. Are children seeing a doctor now that they have coverage? Why or why not? Are they missing prescription coverage or do they have other unmet needs? On the other hand, is your indicator the wrong measurement to be studying?
B. Key Questions to Ask When Measuring Success

Below is a snapshot of the questions that arise when capturing data:

What do we want to measure?

- Among the items that must be measured are the type and amount of benefits (e.g., food stamps: $110/month) that were accessed because of your program. Also, if you are working with a specific category of client, you must measure success in that field as well.

  **Example:** Your organization assists only those who were pre-determined as eligible for a work support but were denied services. You often help clients with an appeal or with applying for other benefits.

  - Your organization should track information such as the amount of benefits the client pre-qualified for, when the client applied, and why they were denied.

  - Aside from this baseline data, staff will need to track their progress through the appeals process or in receiving other benefits. Look for trends in the data – if more clients receive denials during the summer months, or if you see an increase in clients denied for a certain reason, examine the pattern as it emerges. By tracking the data, you can work with clients and caseworkers to overcome hurdles before the clients are denied services.

What information can we collect?

- You can track information based on age, family size, gender, income, job status, housing costs, medical needs, etc. It is important that the data you collect is useful, however.

- You must also obey any privacy rules and regulations involved in the data you collect. Check with your legal staff or a local Legal Aid group to ensure the data points you choose are allowable under the law. Every state has different rules and regulations, but a quick internet search should help you find people who can help you understand the laws in your state.

- You can also ask clients to sign a waiver allowing you to use their information (with any identifying characteristics removed) in your research. Again, make sure that a lawyer or Legal Aid group reviews the document before using it.

  **Example:** Your clients have been complaining about the long, complicated forms they need to fill out to receive services. When you look through them, you realize that the clients must provide information ranging from their date of birth to the last time they visited the dentist to the year they graduated eighth grade.

  - You may have a good reason to ask these questions – for example, dental health is often an indicator of other unresolved health needs. However, the more complicated your forms become, the less likely it is that clients will fill them out.
• Try to choose a few good metrics that can measure success and focus on them. Look for information that you can track later, such as education and salary, which can show your clients’ progress over time.

• Data may also show new populations to serve. In Louisiana, data showed that clients were traveling from their own neighborhoods to the area where services were provided. Health Care For All was able to use that data to expand their services to the neighborhoods where these clients lived.

What do we do with this data?

• Your data can:
  o Determine appropriate interventions and impact of work;
  o Inform the program and decision-making (including improvements to your methods during the time you provide services);
  o Create a case for new/improved policies;
  o Provide information to community partners and funders.

Example: Your organization has been receiving referrals from a local childcare agency and staffing a table in their office. While the area is busy, with many people moving in and out, you realize from analyzing the data that few people are signing up for your programs.

• At this point, you should determine what is keeping the table from being successful and if it is worthwhile keeping that outreach site.

  o Informing decision-making: Looking at the data will allow you to make the appropriate intervention, whether that is changing the time you visit the site to moving the site somewhere else. For instance, if you find that more people are available at the site in the evening, but you visit in the early afternoon, you may need to change the time you provide outreach. Your data will legitimize the decision in the eyes of your partners and funders.

  o Creating a case for new policies: Your data may also explain a policy that needs to be addressed. In Atlanta, one organization found that parents calling for child care referrals, though clearly in need of work supports, earn “too much” to qualify for benefits. This would explain why few people are signing up for work supports. While you should obtain data that backs up your point (for instance, showing that low-income parents earn too much for subsidized childcare, they do not earn enough to pay for childcare out-of-pocket), this is one example of the role your data can play at a policy level.

• Data also eases the move from unproductive sites without damaging your relationship with your community partner. If you explain your poor results, that part-
ner may be able to recommend ways to increase participation, or be more likely to agree that a new location would be better for all concerned. In the Atlanta situation, both organizations were able to agree that their programs were not effective matches.

When do we collect the data?

- Collect different types of data throughout your interaction with the client.
  
  o When you first begin working with a client, collect demographic information (e.g. contact information, gender, marital status, number and age of dependents, income, etc.). At this time, you might also want to look for specific data pertaining to income and access to work supports. Income should include all possible sources, which range from earnings to child support payments and disability benefits.

  o After a client receives a service, it can be difficult to track their progress, but this period is often the most important time to find information pointing to success. During this period, you can learn if clients received a support, how much they received in benefits, what its impact has been, and what other services the family requires. If the family did not qualify for a support, you can work with them to determine what problems they encountered and to help them reapply. However, after receiving a service, some clients may not return calls or may be unreachable. As you set up your work support program, test different ways of following-up with clients. Some organizations build relationships with local government offices that can verify applications made for work supports and the amount of benefits provided. Other organizations rely on follow-up with clients in person, by phone, by mail, or by email. Still others provide services that will bring the clients back, such as education or training classes, thus building a stronger relationship with the client. Use your knowledge of your client base to help determine what will work best with those you are serving.

C. Identify Instrument(s) to Track the Program’s Success

Once you know what data you will track, you need to determine how to track it. Many organizations have a database system to collect information on both individual clients and overall impact on the community. This information is used for internal purposes, including client management and internal evaluation, as well as for external purposes, such as reporting to funders and community partners. With this in mind, you must determine the most efficient way for all staff to access client information. A database should also maintain information on community contacts, such as workforce organizations, food cupboards, etc., and how they affected your success. It is important to track which relationships have yielded the strongest results.

The most basic way to collect data is through paper forms, but this format is not easily sorted when the time comes to gather and report information. Some organizations
choose to enter data from paper forms into a database. If you make this decision, ensure that staff has easy and frequent access to reports that list what the data shows.

Using software requires some forethought, even if you choose to use a basic program already loaded on your computer. You may require a staff person to create a database from scratch or may choose to purchase a database created for your use. Organizations should choose the type of system that best reflect their needs.

D. Ongoing Assessment

Once you begin tracking your data, you should evaluate it often and use it to inform your program, including the work of staff, funders, and partners. You should pay particular attention to gaps in the data and be prepared to modify intake and recording methods to fill those gaps. It is also important to plan for future needs and growth by creating a system that is flexible. For example, does the number of applications for a work support tell the entire story? If not, then what is missing? Should the number of phone calls on corollary issues referred to other community resources be tracked? Should unresolved issues be tracked? As you continue working with this program and your funders, you should be able to determine the answers to these questions.

E. Other Ways of Measuring Success

In addition to quantitative and qualitative measurements, there are other ways of measuring the success of your program that are not necessarily related to numbers. You should also keep track of how your program influences other programs and policies. Your organization may draw the attention of other organizations or even government agencies that are interested in replicating your work support program. Similarly, the work that you do may help you to leverage money or resources from other organizations who would like you to perform the same work for them. Success also comes in the way you mobilize your resources: a work support staff consisting of three people who signs up 100 people for food stamps will be perceived as much more successful than a work support staff of 20 people who signs up the same amount for the program.\textsuperscript{15}

Take the Next Step: Assess Your Readiness

Now that you have read through this section, think more about the data you want to track and the best ways to monitor it. This is a good time to review your notes on how other organizations track their data, or, if you haven’t done that research yet, to go ahead and find out.

Ready... or not?

STOP: If you can’t answer the first few “key questions” in this section.

If you don’t know what you want to measure or what type of information you can collect, you are not ready to proceed. Instead, you should take the time to think
more about your program to determine what would be helpful to know as you implement it. You should also meet with a local legal aid organization or your lawyer (even if it is just by phone) to discuss the legal implications of the information you want to collect, such as privacy needs, and storing/disposing of sensitive information.

PROCEED WITH CAUTION: If you don't know what to do with the data or how to collect it. Until you actually start the program, you won't know how best to use the data or the best way of collecting it, no matter how much research you do. That said, you still need a good idea of what you want to do and how you want to do it before moving forward, if for no other reason than to be able to explain the process to potential funders.

GO!: If you have identified what data you want, how you will use it, and how you will keep track of it.
While you are thinking about numbers and measurement, you should also start asking, “What are the specific needs that funders will have, and how can I meet them?” To answer that question, please see Section 5.

Tools You Can Use


- http://www.ksg.harvard.edu/thebehnreport/index.html - This monthly report focuses on management needs for public agencies, but it also includes important ideas about data measurement that is useful to any organization.

- http://www.lasallenonprofitcenter.org/resources/useful_links.php#outcomes – The Nonprofit Center at LaSalle University has a list of links related to program evaluation.

- http://www.uticapubliclibrary.org/non-profit/outcomes.html - This website includes a number of resources for non-profit organizations, including outcome measurement recommendations.

A FEW WORDS OF ADVICE

“You will gain ten additional steps for every new agency partner that you inform of your program and services because they in turn will refer their clients to your services or offer the services themselves. Collaborations with community partners are crucial to the success of your program.”

- Elizabeth Gomez, Alameda County Community Food Bank
SECTION 5:
FINDING THE FUNDING:
FILLING THE NEEDS OF YOUR FUNDERS AND THE COMMUNITY

In this section, you will learn about:
- The way to create a budget for your work support program
- The opportunities that are available to link past and present funding in your new programs
- The need to build funding opportunities for the future to sustain your efforts

After reading this section, you will be ready to:
- Design a budget that suits your needs
- Meet the needs of funders in applying for and fulfilling grants
- Develop new funding resources for the future

At this point, you might already know who would be open to funding your program. Still, this is a great opportunity to re-introduce yourself to former funders who are looking for fresh funding opportunities, and a chance to tell potential grantors more about the work you will be doing.

As you consider funding sources, you must also keep in mind the time at which you are requesting funding. Some grantors prefer spending money on start-up programs, while others want only established groups with years of results to back up their work. If you find a funder who shares your goals but not your timeline, keep their pertinent information in a separate file. Review the information every three to six months to see if they have become a good fit for your work. (Check their websites to make sure their priorities have not changed.) If you are not sure, ask: the worst they can do is say no, and you can build a relationship that leads to a future yes.

A. Identify and Target Funding Sources

Here are some ways to find funding for your program:
- **Speak to other organizations** that offer similar programs regarding where they find their funding. This is a great chance to work on partnership opportunities: as you begin a new program, you may find it easier to find funding if you are part of a larger group already working in the field. Other groups can act as a **pass-through** by contracting with your organization to provide some of the services they already have funding to do. This is a great way to get started if you are not sure of how to proceed. Think ahead, though, to a time when you will want to perform the service without assistance from this organization, and structure your partnership in such a way that it will not become awkward when your program is ready to apply for funding on its own.
• **Contact current funders** and tell them about your plans. Building relationships with your funders is a good way to ensure they keep you in mind when additional monies become available. No matter how their funding priorities differ from your goal, they may know of someone in the field who would be interested in your program. Reassure your funders that you will still focus on the work you already contracted with them to perform.

• **Join local fundraising organizations.** Many states and communities have non-profit associations which provide research and insight into grant opportunities. If there isn’t one in your area, you may want to consider joining with other local non-profits to fund one.

• **Check into federal, state, and local government funding streams.** Since your work support program will be associated with a government program, look to see what funding they offer to organizations like yours.

*Need an example of how to identify, target, and organize funding sources for future work? Visit the Funding Attachment to this guide.*

**B. Resources and Funding**

In order to create a successful work support program, many organizations will need to develop a funding stream dedicated to the new work being undertaken. For most (if not all) organizations, creating budgets and finding corresponding funders is part of the natural cycle of their year. Unfortunately, being used to the process does not mean that it comes easily.

As you plan a budget for your program, keep in mind the real costs that will be associated with the work you have envisioned. In researching other work support programs, look not only at the overall budget for these programs but how the funding is allocated specifically. Once you set a financial projection on paper and begin working with funders, it can be very difficult to increase the amount to meet your real needs.

Going the extra mile: While preparing the budget, track what methods you use to come to your final decisions. Even something as simple as determining the hourly rate for a staff member should be written down in order to better explain your plan to funders and employees.

Your budget should include the following (some categories will overlap):

• **Salary projections:** These should include not only the employees’ wages but also other employment expenses, such as benefits packages.

• **Consultant/outside personnel fees:** Depending on the program created, you may want to hire workers for specialized tasks, such as a public relations consultant or a paid tax preparer. These hires are often made on an hourly or
weekly contract basis and many times will not include benefits payments. (Be sure to check your internal guidelines and the tax code to classify workers accordingly.) You may want to talk to several PR firms about pricing, for instance, to establish a baseline for your costs.

Going the extra mile: When talking to other outside consultants, choose the one you are most comfortable with to set up a trial contract based on successful funding (similar to the Memorandum of Understanding). You can submit this contract as part of your packet to funders. Be sure if you do create a contract before you have funding that it is very specific about under what terms it will take place to protect you from liability later down the road.

- **Overhead:** These costs include the money spent on space, liability insurance, phone use, accountants, etc. If your organization does not already have a set method of charging for overhead costs, consider adding a flat rate to your budgets, such as setting 7% of all funding aside for overhead (and make sure that will cover your needs). Keep in mind that many funders prefer to pay for program activities rather than operating costs.

- **Technology:** Technology in this sense refers primarily to new or increased technology usage associated with the new program. Some of these costs will be one-time costs, such as the purchase of a new piece of equipment, while others will be ongoing, such as a monthly plan for wireless laptop cards.

- **Printing and Mailing:** Depending on your work, you may be printing brochures, postcards, or publications. If you are printing them in the office, consider the cost of paper and ink, as well as the time it may take to configure your printer(s) to handle the job. If you plan to contract with an outside printer, be sure to include those costs in your budget. The same holds true for mailings: whether in-house or through a mail-house service, determine how much you plan to send and what the cost will be.

- **Miscellaneous:** You may need some extra room for unforeseen costs, such as a rent increase. Just be sure not to over-budget for miscellaneous. Your funders will want to see planning, not a catch-all area.

Be sure to consider all of your costs, no matter how minor they may seem. Many of your one-time costs might fall under the “technology” section, but think about other costs such as the rental of equipment for a one-time event, the cost of hiring a new employee (which may fall under “overhead” depending on your system of accounting), or the cost of providing gifts to your volunteers at the end of the program. Possible ongoing costs include purchasing items on a regular basis (such as folders or other materials you might distribute).
Take the Next Step: Assess Your Readiness

Once you have identified funders and your budget, it is time to start working on your applications for funding. To help you do that, we have a Grant Template in the Funding Attachment that can show you how to set up a grant and the basic rules to follow. Of course, every grantor will have their own expectations for a grant, and you should be sure to pay attention to their rules. This template provides a sample of how to make a grant work if you don’t have strong guidelines from the potential funder.

Ready… or not?

STOP: If you do not have a budget OR if you do not have funding sources to target. Until you have taken the time to make a budget and begin a serious search for funding, there is no point in moving forward with a program that you can’t pay for. You may want to start doing a small amount of work with clients so that you can cite that work in your grant applications, but be careful not to take on too much until you have a defined funding source.

PROCEED WITH CAUTION: If you have applied for funding but your applications have not been accepted.

Once you apply for funding, you must often wait to learn if you will receive the money you requested. Even if you do receive funding, it may be less than what you originally expected to get. Also, a funder may have a certain timeline in which you must spend the money – if you have already begun a program before they offer funding, they may not be willing to reimburse you for previous activities. All of this adds up to the same advice given above: it is ok to start doing a small amount of work, but don’t take on anything large until you know how to pay for it.

GO!: If you have received funding or found ways to use existing funding for your program. At this point, you are ready to begin your program. While it may seem early to start thinking about it, this is also the time to start planning on how to grow and maintain the program. In the beginning of your program, you may just want to take notes on what works and what doesn’t, but as you continue, you should start taking some of the steps listed in Section 6.

Tools You Can Use

- Potential funders to consider:
  - Government funding, such as from the USDA - http://www.csrees.usda.gov/fo/funding.cfm
  - National funders
  - Local, community, or regional foundations in your area – for instance, in the Philadelphia area, we would recommend:
    - The Philadelphia Foundation – www.philafound.org

- To find foundations in your area, explore http://foundationcenter.org, which includes an online search engine.
A FEW WORDS OF ADVICE

“Talk to your state career service center about partnering with you. In PA, for example, the CareerLink provides employment services to individuals who are often eligible for work supports. CareerLink benefits from our partnership because it can offer work support assistance, and the community benefits because they can receive many services in one location.”

– Carol Goertzel, PathWaysPA
SECTION 6:
SUSTAINING YOUR PROJECT: HOW TO MAINTAIN, GROW, AND EXPAND

In this section, you will learn about:
• The importance of evaluating your program's success
• The ways you can find and engage other community organizations
• The abilities your organization has to grow and to reach new people

After reading this section, you will be ready to:
• Establish relationships with key stakeholders and staff
• Use your timeline as a tool to implement your project
• Build institutional capacity to pursue public and private resources

Throughout this guide, we provided information that will send you on your way to building a work support program. However, at a certain point, the planning must end and the actual work needs to begin. The following section will help you expand and grow your program.

A. Continue Your Funding
Here are some ways to find funding for your program:

Throughout your funding cycle, you should provide periodic updates to your funders to show your progress. The best way to prepare for these assessments is to keep accurate and detailed records of the information you will need to provide. Below are some tips to help you track your progress throughout the grant cycle and to write your final grant report:

• Conduct monthly or quarterly assessments of your current funding to ensure that the methodology, data collections, and advocacy work you planned to do is viable. With these assessments, you can tell quickly if you have taken on more work than your organization can provide. If you catch the problem early, you can find the solution you need and have time to implement it. For instance, if you don’t have enough staff to screen all of your clients, you may want to hire new staff, subcontract with another organization, or ask your funder for assistance on how to solve your problem. Don’t try to hide serious problems from your funders – instead, go to them with an explanation of the problem, your plan to remedy the situation, and any requests for help you might have. As part of your regular reviews, you should review all of your funding guidelines to make sure none of the outputs or outcomes are slipping through the cracks. You should also compare your projected outcomes with your actual results.
• **Examine data collection methods** both during and after the grant to ensure that you are gathering everything you need for your reports. Take the time to evaluate your methods and look for new ways to collect data that might more accurately reflect your findings.

• **Evaluate and list your funding strengths and weaknesses** so that you can determine what types of funding you need. Organizations should aim to have balanced funding portfolios – that is, to find funding for a program from a variety of foundations, donors, and government agencies. By spreading out the funding, an organization does not need to rely on any single funder, which is helpful should a funder’s priorities or policies change. Every six months or so, look at your current and potential funders to see how best to increase and stabilize your funding stream.

**B. Review and Evaluate Community Partnerships**

As mentioned earlier, community partnerships are an essential part of a work support program. These partnerships will help build and sustain your program. As you move forward with your program, evaluation becomes key to defining success and measuring the impact you have on the community. Reviewing and evaluating your community partnerships will be an ongoing task that allows you to identify the effectiveness of outreach materials and messaging, the depth of public awareness and support for your program, and even the need in the community that still may not be met. Evaluations are also an opportunity to learn about organizations or businesses that may want to participate in your work support program and to provide opportunities for funding or collaboration.

There are different ways to reach partners to perform an evaluation. Depending on your partners and their preferred modes of communication, you can:

• Create a task force or advisory group to inform your program

• Send out surveys

• Host a conference call with key partners to get input on a consistent basis

• Conduct individual interviews with partners

Evaluating partnerships will be crucial to sustaining your program because you show the support your program has garnered. This evaluation also allows your program to develop new ideas with partners and increases opportunities for expansion and collaboration.

**C. Develop an Electronic Application/ Screening Tool**

While some states create and share electronic application software with the public, others do not offer a way for potential clients (or non-profits!) to apply for benefits on-
line. This leads to a large number of applications that are either never filled out because a client cannot travel to an office or are not received in a timely manner.

Some non-profit organizations have worked to create an electronic application system with the support and partnership of the county or state agency running the program. The partner project in this Oakland example offers this advice:

- Ensure that the government agency running the program partners with you in creating the electronic tool.

- Research the regulations involved to learn how they will impact the tool you create.

- Build a relationship with a local Legal Aid group to protect client rights.

- Choose your IT contractor carefully and make sure they can provide the product you want in an efficient, cost-effective manner.

- Innovate enough to address barriers to client participation, but make sure that the final product addresses their needs.

Electronic screening tools may also make it easier for your clients or your staff to determine what benefits are available. Some agencies, such as PathWaysPA, offer a screening tool that clients can use anywhere they have access to the internet. Clients also have the option of working one-on-one with staff members through the online screening. Once the screening is complete, clients will know how much they need to earn to be self-sufficient and which work supports they can apply for. The tool then links directly with Pennsylvania’s online benefits application (called COMPASS) to help the client or staff fill out an application right away.

Other screening tools are designed to be performed by staff on behalf of clients. SEEDCO, for instance, uses the EarnBenefits tool in one-on-one sessions with clients. Clients can even look at the site ahead of time to learn more about the programs and decide what to apply for. Then, with SEEDCO’s help, they can fill out the application for services. The SEEDCO program has been so successful that a local United Way agency began using it to screen callers to their 211 system. In Oakland and other cities, the EarnBenefits program is used to prescreen clients interested in VITA services. Once the clients have done the prescreening, the information will “prepopulate” the IRS form and be available for future use in applying for other benefits.

**Take the Next Step: Assess Your Readiness**

Now that you are here, there is really just one more step – working on policy. Taking the research and experience you have from your work support program to legislators and to the public will allow you to take the next step in serving families.
Ready... or not?

STOP: If you are just getting started with the other steps in this section. Public policy work will often happen concurrently with your other growth and expansion opportunities. However, if you feel overwhelmed by what you are already doing to grow and expand your project, you might want to wait to move forward with the next section.

PROCEED WITH CAUTION: If you don’t have someone who has the time to devote to policy.

For some organizations, policy work will only involve signing on to an occasional letter or making a few phone calls each month. Other organizations will quickly find themselves involved in the political process by lobbying for bills, giving testimony, and writing comments on regulations that have been passed. Before you enter the policy fray, your organization might want to have in a mind a point person to handle the day-to-day issues that will arise.

GO!: If your organization has good stories and research to share and the time to do it. It will probably never feel like your organization “has the time” for anything other than what they have taken on. But realistically, your staff should know when their tasks have become manageable enough that they can take on another project. If you are at that point, it is time to start looking into policy opportunities for your organization.

Tools You Can Use

- www.pathwayspa.org – The “Online Budget Worksheet” is an example of a screening tool that clients or staff can use to apply for benefits.
- www.earnbenefits.org – This screening tool is a program that staff use to work with clients.
- www.humanservices.state.pa.us/compass/PGM/ASP/SC001.asp - This website leads to Pennsylvania’s state electronic benefits application.

ONE ORGANIZATION’S STORY

Health Care For All (HCFA) began in 1999 with a goal to educate families and enroll children in the Louisiana Children’s Health Insurance Program. It uses a neighborhood health messenger model to educate residents in defined neighborhoods about the various public assistance programs that are available to them. Residents were recruited from the target neighborhood (some were referred by community groups as leaders in the community) and trained in administering surveys, certified in the Medicaid program, maintaining confidentiality, etc.

The program has grown from being solely a door-to-door outreach model to serving families at community centers, clinics, churches, etc. We now develop a calendar each month that the community uses to find us at different locations. We have also grown from serving one neighborhood at a time to serving three in the Greater New Orleans Area. We have also added bilingual Spanish/English staff so that we can better serve the rapidly growing Hispanic community.

-Health Care For All, New Orleans, LA
SECTION 7:  
MAKING POLICY WORK:  
WHY YOU SHOULD GET INVOLVED IN PUBLIC POLICY

In this section, you will learn about:
- The people who impact public policy  
- The way your organization can get involved in public policy  
- The best ways of influencing policy for your organization

After reading this section, you will be ready to:
- Join a policy coalition or network  
- Talk to legislators about important issues  
- Gather groups together to work on public policy issues

Public policy is a fascinating though sometimes confusing field for a non-profit to enter.  
The difficulty for many organizations often is not in finding ways to impact policy, but in learning when to stop.

A. Defining Public Policy

Here are some ways to find funding for your program:

The term public policy describes the process of making a decision in local, state, or federal government.  A public policy may involve the way heating assistance is allocated, or it may determine how best a government agency can provide outreach to low-income individuals.

The people and organizations who try to impact public policy do so for a number of reasons.  Some people, usually referred to as lobbyists, are hired by businesses, corporations, and even non-profits to advocate on behalf of their needs.  Other individuals choose to become advocates for themselves or their communities.  Schoolchildren will sometimes write or visit their representatives to ask for changes in the way things are done.

When visiting a legislator, whether in Washington D.C., in your state Capitol, or in a local legislative office, you will often run into one or more of the groups above, and many more people who don’t fit into any of these groups.  Any time you call a congressperson, write a letter to your mayor, or email your state senator, you are engaging in public policy, and you are doing so with a whole host of others trying to influence how government works.

B. Allowable Policy Activities

Before your organization gets involved in public policy activities, you should learn what
you can and can’t do. Your state may have an association of non-profit organizations that can give you advice on what is acceptable, or you may need to consult a lawyer. In some states, your organization may need to register as a lobbyist in order to participate in public policy.

While you should definitely check with someone who knows the rules in your state, the questions below should give you some guidance if you are a tax-exempt 501 (c) (3):

**What kind of legislative activities can my organization participate in?**

- According to the IRS, no 501 (c) (3) can make lobbying a substantial part of their activities. They may engage in some lobbying, but not too much. However, an organization may “consider public policy issues in an educational manner” without counting it as lobbying.

**What counts as lobbying?**

- Lobbying means influencing legislation, defined as action by any legislature on any level of government. Legislation does not include action by the executive, judicial, or administrative branches of government. If your organization contacts legislators or their staff regarding legislation, or if you propose legislation, you are lobbying. Similarly, if you ask others to contact legislators or their staff, you are lobbying.

**How much lobbying is too much lobbying?**

- The IRS cites a number of ways to measure lobbying, ranging from the amount of time spent by both paid and volunteer workers to the amount of money spent on the lobbying activity. This is called the “substantial part” test. As long as a “substantial part” of time is not spent lobbying, your organization is in the clear.

- If your organization is not a church or private foundation, you may measure your lobbying by expenditures. The amount you are allowed to spend will vary based on the size of your organization, but it cannot exceed $1 million. This is called the “expenditure” test.

**Can we get involved in a political campaign?**

- The quick answer is no: a 501 (c) (3) cannot participate or intervene in any political campaign for elected public office. Among other things, a non-profit cannot make donations to a candidate’s campaign. However, voter education or registration activities, as long as they are nonpartisan, are acceptable. Distributing voter’s guides are an educational activity (and not considered lobbying) as long as they include nonpartisan information on how the candidates stand on various issues. They cannot be written or used to favor or disfavor any candidate running for office.
What if we want to invite a candidate to speak at our event?

- They may speak either as candidates or as non-candidates at events hosted by non-profits.
  - If they speak as a candidate, your organization must offer equal opportunities to other candidates running for that office, and you cannot show any support of the candidate speaking. Also, no political fundraising is allowed.
  - If a candidate comes to speak as a non-candidate (for instance, as experts in poverty issues), your organization will not have to give equal access to other candidates. However, the “non-candidate” must speak in a non-candidate capacity. Furthermore, neither the individual nor any representative of the non-profit can refer to the candidacy of that individual, and no campaign activity can occur in connection with the event.

What if I or the leader of my organization supports a particular candidate?

- As a private individual, everyone in your organization is allowed to support any candidate of their choosing. They can even speak publicly on public policy issues. However, you can’t include partisan comments in official organizational publications or events. To be safe, whenever members of your organization make comments in support of or against a candidate, they should clearly indicate that they are acting in their individual capacity and that their comments do not represent the views of your organization.

C. Government Timelines

If your organization decides to begin lobbying, you will need to take some steps to first learn about how government works in your area. Federal government is almost always in session, barring a few short recesses throughout the year. This means that bills are always being debated, and that legislators or their staff are usually available for consultation. Some states, however, have short legislative sessions each year, or only meet once every two years. This means that while you can contact your legislator at any time during the year, bills are only voted on at certain times. If you live in one of these states and plan to lobby, you need to be prepared to mobilize your organization and others when the time comes.

You also need to learn when important bills will be debated. Organizations interested in advocating for the Food Stamp Program, for instance, need to know that the program is included as part of the Farm Bill, which only comes up for debate every five to six years. In most cases, these bills are debated for a short period (though in the case of the 2007 Farm Bill, it was still being debated as of Spring 2008). This period is known as the reauthorization period. While the reauthorization period is not the only time anything happens around a program, it is often the main time for action. Here are some of the important times for you to know:
D. Ways to Impact Public Policy

So now that you have become involved in public policy, you might be wondering what to do with your involvement, especially if you hear colleagues discussing things like “sign-on letters,” “testimony,” and “comment periods.”

There are many lobbying opportunities to choose from. You likely already receive a number of emails asking you to call your legislators or sign on to a letter, and your first policy step may be following through with one of them. You can also reach out to your partner organizations to ask them where they learn about public policy changes and who they trust to give that information. Your partner organizations may be part of a policy coalition that you would be interested in joining.

You can also find coalitions or specific bills by doing an internet search. For instance, if you are working on VITA sites, you may want to look for organizations who are trying to establish a state Earned Income Tax Credit.

What do you do with these policy opportunities? It depends on those you choose.

Going the extra mile: If you choose to do anything that involves writing, make sure that your writing is clear and concise, and that you express your main points as soon as possible. Remember that, in most cases, the people receiving your materials will be inundated with reams of paper to read. The only way to make an impression is to express yourself quickly and memorably.

• Sign-on letters: Sign-on letters are among the simplest policy activities an organization can engage in. These letters have been written by another organization to send to a legislator and/or the news media. In order to add more weight to the letter, that other organization reaches out to others to “sign on” to the letter.
  • Sometimes sign-ons require an organization to endorse the letter; other times
any individual can choose to sign on to the letter. You can also give the sign-on opportunity to other staff and partner organizations by emailing them with the pertinent information.

*Going the extra mile:* To take the next policy step, write a sign-on letter of your own. Once it is written, you can share the letter with partners or individuals who might be interested in signing on. If you can deliver this letter in person to the elected official(s) to whom it is directed, that is great. If not, fax and email are usually the best ways to deliver the information. A follow-up call helps ensure that the letter has been seen and recorded.

- **Phone calls:** Phone calls are also simple, although they require more time and effort on the part of your organization. To impact public policy by phone, you can choose to call a legislator at any time, or you might call as part of a coordinated campaign to reach legislators and their staff. You should try to call the legislators whose district you live in or whose constituents are served by your organization.

- **Letter writing:** If you have a more complicated argument to make, consider writing a letter to a legislator that lays out your viewpoint. The letter should not be longer than a page, and should clearly state the points you are trying to make.
  - Tailor the points to the interests of the specific legislator - if you see that a legislator serves on the Special Committee on Aging, talk about how the support in question will help older adults or will help adult children care for their older parents.
  - When the time comes to send your letter, you may send a hard copy in the mail, but you should also send it via email or fax. Many offices (particularly in federal government) have their mail examined and irradiated before being delivered. This action takes time and will delay the receipt of your letter.

- **Legislative Visit:** You can schedule visits with legislators either in the capital of your state (or Washington D.C.) or at their local office. Be aware that when you go to the meeting, you may end up talking to a staffer instead of the legislator. This situation often works to your advantage: legislators often lack in-depth information on any given subject, while the staffer in charge of your issue should know the details of your topic and should be interested in learning more.
  - When you visit the office, bring materials on your organization and on the subject you want to discuss. Have a plan for what you want to talk about, and, if more than one person is attending the meeting, who will talk about what.
  - You should also bring a “leave behind,” a one-page document that outlines your argument and what you would like the legislator to do about it. The information should be easy to understand by people who know nothing about your issue, and should include your contact information for easy follow-up. Give these “leave behinds” to everyone you meet with, along with your other information.
  - In the course of meeting with legislators, you will eventually run into someone...
who can only give you a minute to talk. In these cases, you need to have an elevator speech prepared, which is a speech short enough to be given in an elevator ride. Remember: the legislator probably won’t know much about your work, so pitch your speech at a different level than if you were talking to a colleague.

Going the extra mile: As soon as you can after meeting with legislators or their staff, send them thank you notes. Due to the problems with receiving mail, it is usually easier and timelier to send an email or fax to the person in question. Use the thank you to remind the person of the issues you discussed, and also to include anything you may have forgotten during the meeting. If the legislator or staffer asked for further information, include it in this message. However, unless there was a request for specific data, keep the letter short to ensure it is read.

- Public testimony: Public testimony usually occurs when a bill is being debated, although it may also be done around an issue that does not have legislation related to it. If you are an expert on the issue under discussion, you may be asked to testify, but most likely you will need to ask the legislative committee holding the hearing if you can testify. This testimony gives you a chance to express your opinion on an issue directly to legislators who are interested in it.
  o When you give testimony, you must often sign up beforehand with whoever is coordinating the event. Contact the legislative office in charge of the event to ask for time to testify. If, for some reason they cannot give you time, ask to submit written testimony.
  o If you can testify, find out how much time you will have to speak. Ask what technology will be available for your use. Also find out how many legislators will be available so that you can bring enough copies of your testimony.
  o When you prepare your testimony, you should remember that since the testimony will be given orally, you need to present information that is easy to understand upon hearing it. You can use research and client stories to back up your remarks.
  o You should always bring written testimony with you that clearly cites where you found your data. This written testimony can be more complex than the oral testimony, and may include graphs and charts.

- Comments on regulations: When a government entity other than the legislative branch decides to make changes in public policy, it usually does so by changing the regulations that govern a certain program.
  o As the regulations are changed, there are usually opportunities to make comments on the changes, but those chances are limited. Instead, most organizations will make comments after the “interim” regulations are released.
  o If you decide to write comments, be as specific as you can about the changes that you like and don’t like. Give many examples, and cite where you found your information. Comments can range in length from a few pages to as long as you want.

_Not sure about what to say? See the “Outreach to Legislators” Appendix to this publication._

53
E. Building Public Awareness and Support for Public Benefits in the Community

As you continue to work with different kinds of agencies and individuals, it may be helpful to convene all of your partners into an advisory group. Having the support of agencies around the community can also be beneficial when looking for additional funding. Showing that you have a coalition of people who are interested in working on these issues and supporting your program can be a great incentive for funders to continue to support your project.

Your advisory group may want to build awareness and support for public benefits in the community and at the state and federal level. This will involve educating the group on state and federal policies that affect public benefits and informing the public about potential changes in these policies. Some activities that could help build awareness in the community and influence public officials include:

- **Email listserv**
  - This is an easy way to keep partners updated on policy news via email.
  - You can also use a listserv to ask members to take simple actions, such as making a phone call or sending an email to a legislator.

- **Local policy forums**
  - This kind of event creates an opportunity to educate many people in the community about upcoming legislation.
  - It also allows you to pick a location that is convenient for your client population, giving them the opportunity to address community leaders.

- **Letter-writing or phone call campaigns**
  - These kinds of campaigns are one of the best ways to get the attention of state and federal officials. Large stacks of letters regarding a bill tell legislators how their constituents feel about a particular issue.
  - Hearing the voices of many constituents over the phone can also have a strong influence over a legislator's vote.

- **Rallies in support of public benefits**
  - Rallies draw support by bringing a lot of attention to work supports in a public forum while creating a sense of unity on an issue.
  - They can also be used as an educational opportunity for others who see the rally in person or through media attention.

**Taking the Next Step: Assess Your Readiness**

The next step is now up to you! You now have all the tools to move forward with work supports in your program.
Tools You Can Use

- [http://www.9to5.org/downloads/ElectGuide.pdf](http://www.9to5.org/downloads/ElectGuide.pdf) - This is a sample voter's guide to review.
- [http://www.washlaw.edu/doclaw/legis5m.html](http://www.washlaw.edu/doclaw/legis5m.html) - This site provides a list of US legislative resources.
ENDNOTES

1. All data is for 2004 or 2004-2005
2. The Federal Poverty Line is the US government’s definition of poverty.
8. Public policies that encourage and reward work, sometimes by providing services normally available through work such as health insurance. Other policies, such as subsidized childcare, make it easier for families to work.
9. Refundable Tax Credit: give definition
18. http://www.fns.usda.gov/fsp. This data is valid until 9/30/08, unless changes are made with the passage of the Farm Bill.
Appendix

The following pages will help you achieve your goals of a community that has achieved self-sufficiency. Electronic copies of these materials can be found on the accompanying CD.
# APPENDIX: TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>1 - SUMMARY OF ORGANIZATIONS</th>
<th>PAGE 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 - IMPLEMENTATION</td>
<td>PAGE 7</td>
</tr>
<tr>
<td>3 - METHODOLOGY</td>
<td>PAGE 10</td>
</tr>
<tr>
<td>4 - PILOT PROFILES</td>
<td>PAGE 14</td>
</tr>
<tr>
<td>5 - GRANT TEMPLATE</td>
<td>PAGE 30</td>
</tr>
<tr>
<td>6 - MEMORANDUM OF UNDERSTANDING</td>
<td>PAGE 35</td>
</tr>
<tr>
<td>7 - TOOLS FOR STAFF</td>
<td>PAGE 37</td>
</tr>
<tr>
<td>8 - OUTREACH TO PARTNERS</td>
<td>PAGE 44</td>
</tr>
<tr>
<td>9 - PRESS RELEASES</td>
<td>PAGE 47</td>
</tr>
<tr>
<td>10 - OUTREACH TO LEGISLATORS</td>
<td>PAGE 53</td>
</tr>
<tr>
<td>11 - SUCCESS STORIES</td>
<td>PAGE 59</td>
</tr>
<tr>
<td>12 - FLYERS</td>
<td>PAGE 61</td>
</tr>
</tbody>
</table>
SUMMARY OF ORGANIZATIONS

This is a brief summary of the work supports organizations funded by The Annie E. Casey Foundation as well as their contact information. A more complete description of each organization can be found in the Pilot Profiles Attachment.
ATLANTA

Founded in 1986, Seedco is a national intermediary dedicated to innovations in economic opportunity. The flagship program of our asset building portfolio is the EarnBenefits® program, with a proven track record, connecting low-wage workers in five cities to over 16,000 recorded benefits totaling over $22 million in value. EarnBenefits uses a state-of-the-art technology tool – EarnBenefits Online (EBO) – and facilitated enrollment services to connect low-wage workers to a range of income-enhancing public and private benefits, such as tax credits, food stamps, health insurance, and bank accounts. Seedco leverages the local strengths of community organizations, matching it with national scale resources and robust technology tools and relationships. While Seedco is one of many organizations currently using an electronic benefits screening tool, we are unique in the breadth of benefits incorporated, as well as the marketing, education and case management services we provide with our product. These services are an integral component to ensure that families are aware of, access and obtain available benefits and income supports.

Contact:
Gail Hayes
Atlanta Civic Manager
477 Windsor Street SW
Suite 304
Atlanta, GA 30312
(404) 222-3660
ghayes@atlantacivicsite.org

David Jackson
President and CEO
The Center for Working Families, Inc.
477 Windsor Street SW
Atlanta GA 30312
(404) 223-3303

BALTIMORE

Based in Baltimore, Maryland, the Annie E. Casey Foundation wanted to increase access to work supports for residents of its hometown. To do so, in 2006 it began partnering with New York-based Seedco to bring the EarnBenefits® online benefits screening and application tool to Baltimore. Baltimore’s EarnBenefits program connects low-wage workers to 19 federal, state, local public and private benefit programs, including the Earned Income Tax Credit, food stamps and public health insurance.

Contact:
Sara Johnson
Program Associate
SEEDCO, c/o Job Opportunities Task Force
231 East Baltimore Street Ste. 1102
Baltimore, MD 21202
(410) 234-0279
sjohnson@seedco.org
NEW ORLEANS

The New Orleans Work Support Pilot grew out of the Healthcare For All Program, launched in 1999 to increase enrollment in the State Children’s Health Insurance Program (SCHIP) and based at the Kingsley House. Kingsley House, founded in 1896, is a community based organization providing education, family support and community building services in New Orleans. In the Healthcare For All Program, Kingsley House worked with the Department of Health and Hospitals (DHH) to hire and train community residents, called Walkers and Talkers, to go door-to-door to help eligible families apply for SCHIP.

Contact:

Luanne Francis  
MPH, CHES  
Program Manager  
Health Care For All  
Kingsley House  
1600 Constance Street  
New Orleans, LA 70130  
(504)-523-6221  
lf francis@kingsleyhouse.org

Kristina Gibson  
Program Supervisor  
Health Care for All  
Kingsley House  
3201 General DeGaulle Drive  
Suite 206  
New Orleans, LA 70114  
(504) 367-1171  
k gibson@kingsleyhouse.org

Catrina Trumble-Corey  
Walker/Talker II  
Health Care For All  
Kingsley House  
1600 Constance Street  
New Orleans, LA 70130  
(504)-523-6221  
Ct rumble- corey@kingsleyhouse.org

OAKLAND

A partnership between the California Association of Food Banks, the Alameda County Community Food Bank and Making Connections Oakland is piloting a community-based outreach effort to increase the number and percentage of eligible residents in the Lower San Antonio neighborhood who receive food stamps. They are simultaneously piloting a technology tool that will enable community based, bilingual/bicultural outreach workers to electronically submit food stamp applications and supporting documents through a secured server without having to leave their neighborhood.

Contact:

Elizabeth Gomez  
Outreach Program Manager  
Alameda County Community Food Bank  
7900 Edgewater Drive  
Oakland, CA 94621  
(510) 636-4905  
egomez@accfb.org

Jessica Bartholow  
Statewide Program Manager  
Food Stamp Outreach and Nutrition Education  
California Association of Food Banks  
909 12th Street, Ste. 203  
Sacramento CA 95814  
(916) 321-4435  
www.cafoodbanks.org
PHILADELPHIA AREA

PathWaysPA, launched in 1978 as the Women’s Association for Women’s Alternatives to provide residential and community-based services such as social services, job training and employment assistance to women and their children, houses the work supports pilot in the City of Chester in Delaware County. As a part of the pilot, PathWaysPA conducts outreach and provides case management support to families, connecting them with public benefits such as food stamps, Children’s Health Insurance Program (CHIP), Medicaid and the Earned Income Tax Credit (EITC).

Contact:

Carol Goertzel
President/CEO
PathWaysPA
310 Amosland Road
Holmes, PA 19043
(800) 209-2914
cgoertzel@pathwayspa.org

Lynda Kugel
Director of Self Sufficiency Projects
PathWaysPA
310 Amosland Road
Holmes, PA 19043
(800) 209-2914
lkugel@pathwayspa.org

Carolyn Finklea
Senior Associate, Tax & Benefits Specialist
PathWaysPA
310 Amosland Road
Holmes, PA 19043
(800) 209-2914
cfinklea@pathwayspa.org

SEATTLE

The Food Stamp – Employment and Training (FSET) pilot, a collaboration of seven area organizations that are seeking to provide low-income residents with workforce development and work supports, is launching a pilot to draw on resident networks and leaders to increase take up rates of food stamps, employment and training programs, and other work supports in the neighborhoods of White Center and Boulevard Park. The FSET collaborative includes Airport Jobs, Goodwill, South Seattle Community College, YWCA, Refugee Federation Service Center, Seattle Jobs Initiative, and the Washington State Department of Social and Health Services (DSHS).

Contact:

Vicki Asakura
Executive Director
Nonprofit Assistance Center
1618 So. Lane Street Ste. 201
Seattle, Washington 98177-2257
(206) 324-5850
vasakura@nacseattle.org

Mengsteab Tzegai
Site Coordinator
Refugee Federation Service Center
122 23rd Avenue South
Seattle, Washington 98168
(206) 762-4894
mengsteab@rfsc.org

Lynda Kugel
Director of Self Sufficiency Projects
PathWaysPA
310 Amosland Road
Holmes, PA 19043
(800) 209-2914
lkugel@pathwayspa.org

Carolyn Finklea
Senior Associate, Tax & Benefits Specialist
PathWaysPA
310 Amosland Road
Holmes, PA 19043
(800) 209-2914
cfinklea@pathwayspa.org
SEEDCO

For 20 years, Seedco, a national nonprofit organization based in New York City, has worked with local partners across the US to create economic opportunities for disadvantaged job seekers, workers and neighborhood entrepreneurs. Towards that goal, it launched EarnBenefits®, a program design to connect low-wage workers to benefits using an online screening and application tool in New York City in 2005. EarnBenefits helps low-wage workers access over 30 federal, state, local public and private benefit programs, including the Earned Income Tax Credit, food stamps, public health insurance and child care subsidies. Since its launch in New York City, EarnBenefits has been expanded to operate in Memphis, Atlanta, Baltimore and Buffalo.

Contact:
Chauncey Lennon
Vice President
SEEDCO
915 Broadway 17th Floor
New York, NY 10010
(212) 473-0255
IMPLEMENTATION

This worksheet will help you in getting your thoughts down on paper to explain your work to your board, your funders, or your future partners.
As this guide sets the stage for your organization to become involved in work supports, you will need to plan a set of next steps for your organization. Depending on how long your organization has been considering a work support program, you may have done much of this work already. Regardless of where you are as an organization, however, the next questions are designed to ensure that you have thoroughly explored all of your options in setting up a work support program.

**A. Government (State and Local)**

Understanding state and local government structures is important in running a successful work support program. These levels of government are often responsible for the day-to-day business involved in the work support of your choice. By knowing who administers work supports and the process behind the administration, your organization can determine how best to streamline the process and who can help smooth out administrative kinks along the way.

1. Determine who administers work support program(s) in the state, county, or city.
2. Assess existing contacts within your organization for links to those who administer these programs.
3. Jot down important ideas to research and follow up on.

**B. The Community**

The needs of the community make up the most important aspects of your research. The work you do to understand the community and assess their needs can make or break your program. As you assess the needs of those you plan to serve, explore the opportunities that are already available to meet those needs. If other organizations offer work supports in the community, determine whether there are any gaps in their services, or if you can learn better from the choices they made. Having all of this in writing will be important to funders as it shows that you not only understand the community you work in, but also the unique role your organization can play within the community.

1. Assess the need for work supports in the targeted community.
2. Identify the work supports available in the community.
3. Analyze current levels of participation in work supports in the state and local community, including the trends and take-up rate of eligible participants.
4. Whom can you collaborate with to offer services?
5. Are others offering work support services in the community?
   - Who?
   - Are they offering the same services you plan to offer?
   - Are there any gaps in their service delivery?
   - How can you address those gaps?
   - Is your help still needed if they are already working in the community? If so, why?

**C. Organization Fit: Mission**

Before going forward with your work support program, it is best to assess how your organization’s mission and goals fit with the program you would like to provide. This is
also a good time to determine at what level your organization can offer work supports to the community, and how many people it will be able to serve. Thinking through this piece of the puzzle early on makes it easier to answer questions of funders and potential collaborators when entering the field of work supports.

1. Review organization’s mission, goals, and infrastructure to determine organization fit.
2. Assess contacts to build and expand relationships and partnerships for delivery of services.
3. Assess organizational capacity to deliver confidential services: in-house, mobile site, or site based.
4. Assess organizational capacity to inform policy advocacy.

D. Organization Fit: Staffing

Your staff will also be key to providing work supports in ways that will meet the needs of your community and your funding sources. Early analysis of your staff’s strengths and weaknesses will give you insight into how best to structure the program, what outputs and outcomes are suitable, and how best to enhance your staff’s abilities. This portion is especially important if you plan to hire new staff to perform work support components, since you can then look for staff that will complement the strengths of existing workers.

1. Determine the staffing structure needed and the skills required to create and maintain a work support program in your community.
2. Review current staff and their knowledge, skills and ability to deliver this service and manage input/outcome data.
3. Determine the gaps in staffing structure and how it can be supplemented with additional staff (e.g. social work student interns, full-time/part-time staff, VISTAs, and volunteers).
4. Identify required staff training, including refresher and cross trainings.

E. Technology

Finally, before offering work support programs, you should be aware of the technological capacity available at your organization (and the technological capacity that your staff will be comfortable with). As you assess your needs, remember that technology is not only a matter of hardware and software for computers, but also the phone lines, internet connections, and electricity outlets that are needed to make the technology happen.

1. Assess your technology needs and ability to access the internet.
2. Develop capacity to provide online services to clients.
3. Assess your database development, capacity, and need for improvement. Do you have a client tracking system? What format will be used to enter the data from the intake form (e.g. MS Access, Excel)? Who will enter the intake data into the database (e.g. intake staff or case management)? Is it one or many staff people?
4. Select/develop database system based on a system already in place or one of those described in this guide.
METHODOLOGY

This attachment looks at the ways other organizations have moved forward in providing work support services.
Ask these questions of other programs that you are researching, but also ask them of yourself as you make plans for your services. Some of these questions may also help you later in the process, when you are requesting funding or when you are writing progress reports to your funders.

Your Program

1. What is the name of your program?
2. When did your program begin and what is its purpose?
3. What is your program methodology? How did you set up your program? How has it grown?
4. How did you do research before beginning this program? Where would you recommend other organizations begin their research?

Staff and Partnerships

1. How many staff members work on this program? Has the number changed since you began the program?
2. Do you collaborate with any of the following?
   a. Food Banks
   b. Hospitals
   c. Legislators – federal
   d. Legislators – state
   e. Legislators – local
   f. Other organizations – local
   g. Other organizations – national
   h. Other organizations – statewide
   i. Religious organizations
   j. Schools
   k. Other
3. How did you get involved with these partners?

Clients

1. What is the need for your services in the community you serve? How many clients do you see each year?
2. Which of the following do you use to recruit clients?
   a. Direct Mail
   b. Door-to-Door Canvassing
   c. Email
   d. Existing Client Base
   e. Newspaper Ads
   f. Outreach Events
   g. Partnerships with Government Entities
   h. Partnerships with Other Organizations
   i. Phone Banking
3. With what recruitment method(s) have you found the most success? Why?

4. What do clients experience when they come to you to learn more about a work support? What happens after they sign up?

Measuring Success

1. How do you measure the impact of your program?

2. Which of the following information do you collect from your clients?
   a. Age
   b. Date of Birth
   c. Family Makeup (ages of other family members, etc.)
   d. Family Size
   e. Gender
   f. Housing Cost
   g. Income
   h. Medical Needs
   i. Race
   j. Work Status
   k. Other

3. What other information do you collect? Are there certain items you ask clients to bring with them when they meet with you?

4. How do you use data to inform your program?

5. What are the gaps in the data? What do you need to know that is not currently captured?

Equipment and Technology

1. Which of the following does your program use on a regular basis?
   a. Copy Machine
   b. Database Software
   c. Email
   d. Fax Machine
   e. Internet
   f. Laptop
   g. Online Application Form
   h. Phone
   i. Postal Service
   j. Scanner
   k. Wireless Internet
1. Other

2. What is the most important piece of equipment you use in your program?
3. What single piece of equipment or technology would make your program run even better?

Success Stories

1. Please share some of your success stories.
2. Do you share your success stories with the news media? If so, how?

Advice

1. If you were going to start up this program in another city, what would you need?
2. If you were advising a group who was starting up a similar program, what advice would you give them?
PILOT PROFILES

This is a summary of the pilot work supports programs recently funded by The Annie E. Casey Foundation. For contact information, please visit the Summary of Organizations Attachment.
Atlanta Work Supports Pilot Profile

Founded in 1986, Seedco is a national intermediary dedicated to innovations in economic opportunity. The flagship program of our asset building portfolio is the EarnBenefits® program, with a proven track record, connecting low-wage workers in five cities to over 16,000 recorded benefits totaling over $22 million in value. EarnBenefits uses a state of the art technology tool – EarnBenefits Online (EBO) – and facilitated enrollment services to connect low-wage workers to a range of income-enhancing public and private benefits, such as tax credits, food stamps, health insurance, and bank accounts. Seedco leverages the local strengths of community organizations, matching it with national scale resources and robust technology tools and relationships. While Seedco is one of many organizations currently using an electronic benefits screening tool, we are unique in the breadth of benefits incorporated, as well as the marketing, education and case management services we provide with our product. These services are an integral component to ensure that families are aware of, access and obtain available benefits and income supports.

In 2005, the Annie E. Casey Foundation and The Arthur M. Blank Family Foundation made a joint investment to bring EarnBenefits to Atlanta. Their initial investments funded the build out of the tool to align it with public and private work supports provided in Atlanta and the recruitment of implementation partners. EarnBenefits Atlanta enables partners to screen people for a wide range of work supports, including:

- Health benefits such as Medicaid, PeachCare for Kids and WIC;
- Monetary benefits such as Food Stamps and Individual Development Accounts;
- Housing benefits such as Habitat for Humanity homes and housing counseling support;
- Tax benefits such as the Earned Income Tax Credit (EITC) and the Child Tax Credit (CTC); and
- Children and family benefits such as TANF, Head Start and the Georgia Pre-K program.

The initial implementation partners, including The Center for Working Families, Inc., Quality Care for Children, Sheltering Arms and YMCA, officially launched EarnBenefits Atlanta as a 12-month pilot in January of 2006. A Seedco Project Manager based in Atlanta coordinated the project. During the pilot year, partners pre-screened nearly 900 low-income individuals and connected almost 400 of them with a wide range of work supports.

During the pilot and full implementation, EarnBenefits Atlanta has benefited from strong support from the Georgia Department of Human Resources (DHR). DHR became a mission critical partner in the pilot year by helping to imbed the state’s eligibility rules into the screening system. Seedco and its Atlanta partners have continued to deepen their partnership with DHR and DHR is now an investor in the program. It negotiated a contract with Seedco to increase Food Stamp outreach and take up using EarnBenefits in 2007. DHR has also streamlined the application process by designating a staff person to serve as the contact for the program and sharing data with the program. Using EarnBenefits Online® (EBO), Seedco’s web-based benefits screening tool, partners can pre-screen an individual for benefits and generate a completed ap-
plication for him/her. Program staff fax then the application to the DHR contact who 
transmits it to the appropriate Department of Family and Children Services (DFCS) 
oflice for processing. This saves the program staff from having to identify the appropriate 
office and their contact information and for the client, streamlines the application sub-
mission process.

The data sharing agreement allows Seedco to measure the impact of this work. Each 
week, it submits a list to DHR of all of the applicants it served and DHR provides infor-
mation on their enrollment status. This information, coupled with the information that 
the EarnBenefits tool captures during the application process, allows EarnBenefits At-
lanta to collect and track data on the people being served, including household size, 
income, assets and work status. EarnBenefits also collects data on the services pro-
vided to the customer, including the benefits for which they were screened, whether or 
not they were determined to be eligible, if they received those benefits and the dollar 
value of the benefits.

Since the launch of the pilot, Seedco has employed two local Project Managers to 
oversee program development and implementation. These Project Managers have 
been critical to the success of the program. The first Project Manager oversaw the im-
plementation of the pilot in 2006 and helped move the conversations forward with 
DHR as she provided effective coordination and management of the pilot’s develop-
ment and implementation. She played a crucial role in recruiting private benefit part-
tners so that individuals could be screened for both private and public benefits.

A new Project Manager came on board in the spring of 2007 and she has deepened 
the partnership with DHR. Under her leadership, EarnBenefits Atlanta has tripled the 
funding it receives from DHR. She also helped to integrate Housing Counseling sites 
into the EarnBenefits Atlanta network. Seedco is a HUD-funded Housing Counseling 
intermediary with four sites in Atlanta. Housing Counseling benefits are now pro-
grammed into the screening tool and some of the Housing Counseling sites have 
been trained to use the EarnBenefits online screening tool.

The Atlanta work support program has continued to recruit additional implementation 
partners in order to reach a broader population.

- The Atlanta Workforce Development Agency (AWDA) joined the program as an 
  implementation partner in January of 2007 when it launched the city’s largest 
  VITA site. The VITA site attracts a large number of individuals and families who 
  can also be screened for non-tax benefits using EBO. In 2007, the site served 
  more than 600 tax filers.

- The Atlanta Community Food Bank has enabled the program to foster valuable 
  relationships with other CBOs. It coordinates the Atlanta Prosperity Campaign, 
  which sponsors free tax preparation services in 34 sites across the city to help 
  low-income filers avoid predatory fees and to ensure that all eligible filers re-
  ceive the Earned Income Tax Credit. Tax preparers used EarnBenefits to screen 
  filers for work supports at two of those sites in 2008 (including The Center for 
  Working Families which was the highest performing tax site in 2008) and con-
  versations are underway to expand the screening to additional tax sites in future 
  years.
Atlanta Legal Aid also joined the program as a grantee in 2007, using EarnBenefits to support DHR’s efforts to increase Food Stamp outreach and take up.

Seedco continues to seek new partners for this effort and is in conversation with the Sullivan Center, the Impact! Group, Catholic Charities, St. Vincent De Paul and Angel Food Ministries.

United Way of Metropolitan joined the EarnBenefits pilot in 2006 as both a funder and implementation partner. In late 2006, United Way’s 211 call center staff began to use EarnBenefits to screen callers. Both the receptionists answering 211 calls and the specialists to whom callers with more complicated need are transferred were trained to use EarnBenefits and to mail the completed applications to the callers for them to submit. In late 2007, however, United Way of America invested in a different screening tool and the United Way of Metropolitan Atlanta is now using that tool in its 211 call centers.

EarnBenefits Atlanta continues to set ambitious targets for this work. In 2007, over 2700 individuals were screened for benefits and over 1500 were connected with at least one benefit. In 2008, with the expansion of the Network, and the addition of financial education workshops and services, EarnBenefits Atlanta seeks even greater outcomes.

As the program grows, Seedco will investigate the potential of delivering benefit screening and facilitated access to employees through their employer, using a call center model. Seedco has developed a pilot initiative, partnering with a major Employee Assistance Program provider’s call center and several employers in New York, Wisconsin and North Carolina. Seedco could explore leveraging this initiative to help large employers of low-income workers in Atlanta offer the service to their employees.

In May of 2007, United Way of America announced that it would invest $1.5 billion in the United Way Financial Stability Partnership, a nationwide initiative designed to help low-to-moderate income individuals and families achieve financial stability. This initiative is seeking to increase the percentage of eligible people receiving the EITC, increase access to mainstream financial services and accounts, and use technology to increase access and enrollment in public benefits and work supports. To reach national scale in this initiative, United Way of America researched available technology tools and selected the Benefits Enrollment Network (BEN) designed by Nets to Ladders, an Austin, Texas-based technology firm. United Way of Metropolitan Atlanta, therefore, made the decision to use the Benefits Enrollment Network tool in its call centers and launched this new online tool in its call centers and targeted agencies in January 2008. United Way of Metropolitan Atlanta plans to expand the use of BEN more broadly including linking the tool with its Homeless Management Information System to ensure that homeless people have access to public benefits that might help them regain stable housing.

Funders of this program have included the Casey and Blank Foundations, United Way of Metropolitan Atlanta, DHR and AIG (American International Group).
Baltimore Work Supports Pilot Profile

Based in Baltimore, Maryland, the Annie E. Casey Foundation wanted to increase access to work supports for residents of its hometown. To do so, in 2006 it began partnering with New York-based Seedco to bring the EarnBenefits® online benefits screening and application tool to Baltimore.

Casey and Seedco hosted a bidder’s conference where potential implementation partners could learn more about the EarnBenefits program, the goals of the work supports pilot, the collaborative model for the pilot and roles and responsibilities of partners. Afterwards, they released a Request for Proposal, receiving more than 15 proposals in response. During the summer, Seedco reviewed the proposals, conducted site visits at the organizations and worked with a local steering committee comprised of funders and key partners to select four implementation partners: ACORN, Hon Secours, Catholic Charities and East Baltimore Development Inc. Seedco provides each of these partners with an annual $35,000 grant to fund their work supports efforts. Baltimore’s EarnBenefits program connects low-wage workers to 19 federal, state, local public and private benefit programs, including the Earned Income Tax Credit, food stamps and public health insurance.

The pilot officially launched in September 2006 when Seedco hired a local manager, hosted a series of training sessions with implementer partners and worked with the partners to outline concrete implementation plans. The four implementing partners, ACORN, Bon Secours, Catholic Charities and EBDI, are high capacity and are based in low-income neighborhoods. They were also chosen because of their geographic locations which enable them, together, to reach a large and diverse catchment area.

ACORN and Bon Secours have hosted VITA tax preparation sites for several years as a part of Baltimore’s Creating Assets, Savings and Hope (CASH) Campaign. They have integrated the EarnBenefits screening into that effort. Their history as tax sites has attracted large numbers of people for tax services. Many filers are not interested in additional wrap around financial services when they are filing their taxes, however, so the two sites planned in advance to streamline the two processes. When filers come to the site, a greeter helps them complete the EarnBenefits online intake form which can automatically populate portions of their tax forms while screening them for additional supports. While Catholic Charities and EBDI do not have tax sites to create increased demand for their EarnBenefits screenings, they can screen individuals for the EITC and then refer them to other CASH sites and CASH sites located near these two organizations are referring their filers to them to enroll in additional supports.

Catholic Charities has hired an employee who focuses entirely on screening individuals, using EarnBenefits. She travels to health fairs, financial fitness fairs and other targeted events where she distributes information about work supports, conducts screenings and sets appointments for screenings at a later date.

By December, the partners had screened more than 200 individuals and had helped 6 of those enroll in at least one benefit. That number has increased sharply in early 2007 as a result of the tax season. As of mid-March 114 people had received at least one benefit as a result of the pilot.
The Baltimore Work Supports Pilot has benefited from a good working relationship with its government partners. Along with several funder partners (Casey, Strauss, Abel, Thalheimer, and Weinburg foundations) and service partners (CASH Campaign and Job Opportunities Task Force), the Baltimore Work Supports Pilot Steering Committee includes representatives from the state office of the Department of Human Resources and the local Department of Social Services. They provide a great deal of expertise with regards to public benefits policies, practices and procedures. The Pilot will seek to expand and deepen those relationships over time by streamlining the application process and adding representatives from the housing authority, fuel fund and other public benefit offices.

In late 2006, the Maryland Department of Human Resources launched the Service Access and Information Link (SAIL) system (www.marylandsail.org). SAIL is a web-based screening and application tool that allows Maryland residents to apply for food stamps, temporary cash assistance, temporary disability, Children's Health Insurance Program, Energy Assistance Program and Child Care Subsidy Program and other supports. This new state tool is increasing the impact of EarnBenefits. Counselors and case managers can log into SAIL as a community based partner and help individuals submit applications to the state for processing while completing the EarnBenefits screen. The Pilot hopes to be able to access data on the applications its partners submit in order to measure the impact. The state has enjoyed its partnership with the Pilot in order to increase awareness and usage of its new system and to improve the system. The Pilot partners share questions that clients raise while completing the SAIL forms so that the state can make the program more accessible.

The Pilot and its partners meet monthly to discuss their successes and impact. Seedco compiles the number of screenings conducted, the number of individuals who were eligible for a benefit, the number who received application assistance and the number who enrolled in at least one benefit. The managers from each of the implementing partners and the 24 screeners trained to use EarnBenefits discuss what is working, where improvements are needed and how to best connect and work with clients. In the future, the Pilot hopes to be able to track and measure the impact on job retention, the recertification of benefits and how people’s benefits change over time as their income increases. Some of this can be achieved through follow up screenings at regular intervals, which the Pilot hopes to institute this year. These monthly meetings also offer the opportunity for professional development with a different professional from the field speaking for a portion of each meeting.

The grants to partners are paid out in three installments based upon performance. In order to receive the final installment, the partner must have achieved 75% of their annual target. The four partners have identical targets for the year. Those targets are: 515 individual screenings, 412 individuals found to be eligible for at least one benefit, 309 individuals receiving application assistance, and 225 individuals enrolling in at least one benefit.

Other organizations have expressed interest in joining the Pilot by offering EarnBenefits screenings. The Pilot partners are investigating referral partnerships with these organizations. The Pilot would then track where these individuals are receiving their referrals in order to uncover the service hubs that draw low-income workers.
New Orleans Work Supports Pilot

The New Orleans Work Support Pilot grew out of the Healthcare For All Program, launched in 1999 to increase enrollment in the State Children’s Health Insurance Program (SCHIP) and based at the Kingsley House. Kingsley House, founded in 1896, is a community based organization providing education, family support and community building services in New Orleans. In the Healthcare For All Program, Kingsley House worked with the Department of Health and Hospitals (DHH) to hire and train community residents, called Walkers and Talkers, to go door-to-door to help eligible families apply for SCHIP.

In 2005, they began to investigate the potential of expanding the Walkers and Talkers’ scope of work to include sharing information about food stamps and helping eligible families apply. Those plans were delayed by Hurricane Katrina which struck New Orleans in the fall of 2005. Many DSS staff were forced to evacuate the area along with other residents and, when the offices reopened, their location had changed and their hours of operation were curtailed. These changes, when coupled with the fact that many families had lost possessions and jobs and social networks were uprooted and services fractured, made launching the pilot even more critical to maintaining family stability. When Kingsley House and DSS staff had returned to the city, they were able to reassess the need and finalize a Memo of Understanding to launch the pilot in June of 2006.

Initially, the pilot targeted the neighborhoods located around Kingsley House, but the data showed that many returning evacuees who were settling in an area of New Orleans that was across the Mississippi River were crossing the river to take advantage of the application assistance. Kingsley House expanded its service area to include the western side of the river in November 2006 and has since opened a new office there. In 2007, they hired and trained an additional four certified food stamp specialists, for a total of 10 specialists in the two offices. During the year, they plan to work with community based organizations and churches that will host temporary offices and help them canvas the neighborhood, enabling them to serve residents across the city.

The Work Supports Pilot builds on Governor Kathleen Blanco’s proclamation to eradicate poverty and bring Katrina evacuees home quickly. By identifying eligible individuals and families who are not receiving food stamps and other public benefits, the pilot increases food security and family stability while people seek to rebuild their lives by finding permanent housing and employment in New Orleans.

As a result of Hurricane Katrina, the large majority of the families being served in the pilot are former food stamp recipients who are seeking to re-enroll after returning to the community. Only about 10% of their participants are first time applicants. Recognizing the impact that Katrina had on families, the Walkers and Talkers are targeting seven area shelters where many returning families are living while they seek permanent housing. DSS had been receiving numerous applications from these shelters and the Walkers and Talkers are able to help families complete the applications properly, diminishing delays in processing time so that they receive the supports more quickly.

Because there is no online or electronic application tool in Louisiana or New Orleans, all food stamp and other benefit applications must be completed and submitted on paper. Kingsley House compiles those applications daily and submits them to the local
food stamp office with a cover sheet, listing information about each applicant. This allows staff to maintain a record of the number of applications submitted and to track how long processing takes. They track the take up of food stamps but do not track the take up rate of the other benefits — child care assistance, FITAP cash assistance, and Kinship Care — with which Walkers and Talkers provide assistance.

The Pilot works in partnership with Catholic Charities and the Hispanic Apostolate to connect with immigrant families. Many legal immigrants are scared to apply for food stamps because their immigration papers were lost or destroyed in the storm. Kingsley House is seeking a partnership with the Immigration Law Center in order to better advocate for the families they are serving that also face immigration issues. While they continue to struggle with issues of immigration, Kingsley House is implementing strategies to alleviate some of the barriers that immigrants face. State outreach and application materials are not provided in Spanish and translation services are not provided in the food stamp offices. Its partnership with the Hispanic Apostolate enables Kingsley House to provide assistance to Spanish-speaking applicants. The Walkers and Talkers have also received cultural competency trainings to increase their sensitivity in asking for immigration documents and discussing immigration issues.

Many New Orleans families have received FEMA and/or insurance settlements as a result of damages they suffered after Katrina. Because there is a shortage of contractors to begin reconstruction on homes in the area though, few have been able to reinvest those funds in new homes. DSS, therefore, has sought and received two temporary waivers ensuring that those funds will not disqualify any low-income families from food stamp eligibility. DSS has also implemented a disaster training for its food stamp program so that it will be prepared to administer the program during and immediately following any future disasters.

Since launching the work supports pilot last June, Kingsley House had helped to enroll more than 500 individuals through December 2006. Approximately 75% of the applications filed with assistance from the pilot resulted benefits. In their first five months, they had funneled approximately $34,000 in benefits to eligible residents. In 2007, Kingsley House will seek to enroll an additional 1,000 individuals by working in partnership with other community partners and child care centers.

They will also seek to increase and measure the value they bring to DSS. Currently, they track the number of applications that are certified and the dollar amount resulting from those applications. Moving forward, they will also seek to measure how their assistance results in more properly completed applications and, therefore, a result in the processing time for applications.
Oakland Work Supports Pilot Profile

A partnership between the California Association of Food Banks, the Alameda County Community Food Bank and Making Connections Oakland is piloting a community-based outreach effort to increase the number and percentage of eligible residents in the Lower San Antonio neighborhood who receive food stamps. They are simultaneously piloting a technology tool that will enable community-based, bilingual/bicultural outreach workers to electronically submit food stamp applications and supporting documents through a secured server without having to leave their neighborhood. The tool, the Food Stamp Application and Screening Tool (FAST), was developed by the California Association of Food Banks using a screening tool developed by the LA Regional Food Bank five years ago. The implementation of the pilot began in March 2007.

The Lower San Antonio is home to many people with undocumented status, many of whom do not speak English. Spanish, Vietnamese and Cantonese are among the languages spoken in this culturally diverse neighborhood. Nearly 30% of residents also live in poverty. While the Alameda County Social Service Agency reports that 2,643 households in Lower San Antonio participate in the food stamp program, recent Census data suggest that 21,643 families in the neighborhood are income-eligible for the program.

The pilot is seeking to connect at least 250 eligible residents with food stamps, approximately a 10% increase, drawing an additional $504,000 in federal dollars into the neighborhood each year. They plan to do this by pre-screening at least 500 families, helping at least 358 of them to submit applications. They expect that their community-based and culturally-diverse outreach and pre-screening efforts will result in 70% of those applications being accepted as compared to 48% of applications submitted through the standard outreach and application process. The pilot partners will measure their success in moving towards their goals by tracking and analyzing data collected on FAST. Alameda County has also agreed to share data on the people served by the pilot and that submit an authorization of release of information so that the partners can measure the long-term impact on residents’ household income.

Two residents of the Lower San Antonio neighborhood were hired to conduct outreach about the food stamp program and provide one-on-one application assistance among their neighbors. One of the outreach workers speaks both bi-lingual in English and Spanish and bi-cultural while the other is bi-lingual in English and Vietnamese and bi-cultural. Other outreach staff at the Food Bank also speaks Spanish and Cantonese, in addition to English.

The pilot partners were excited about the ease with which they were able to recruit and identify neighborhood residents to fill the outreach positions using word-of-mouth as the central recruiting method. They made the choice to hire two part-time workers rather than one full-time worker in order to ensure language diversity and because they felt that potential candidates would have other personal commitments that would prevent them from being able to maintain a full-time position.

The Oakland Work Supports Pilot is also testing a peer-support network. Residents who have successfully completed the application process are being invited to volunteer to serve as peer outreach workers. Drawing on the experiences of a food bank
staff person whose mother received critical peer support before starting dialysis and struggled with language barriers and cultural differences, the peer network will address some of the cultural and social barriers to food stamps in this immigrant community where many are hesitant to apply for food stamps because of fears of immigration issues and misconceptions about the program. Successful food stamp applicants frequently call to thank the organization or case manager who helped them apply for the benefit and indicate a desire to “give back.” The peer support network will provide them with an outlet to give back by becoming advocates for food stamps and their neighbors using an ‘each one help one’ model.

The pilot and its electronic application tool, FAST, are modeling for other counties and communities a process by which they can take advantage of recent rule changes by the State of California to increase low-income residents’ access to food stamps. Historically, food stamp applicants are required to submit their application and supporting documents and complete a face-to-face interview with Department of Social Services staff. Recently, the USDA offered states the option to waive that requirement for people with hardships like family care responsibilities, transportation, work or disability and, last year, California issued an all-counties letter enabling county service agencies to waive the meeting requirement due to hardship and postpone the finger-imaging requirement. As successful results build support for the pilot, the partners will investigate the possibility of integrating additional benefits into FAST.

The California Association of Food Banks developed FAST with grant support from the USDA. They had researched other work support and public benefit online application tools, including The Benefit Bank, Mission Research and FoodChange, but were dissuaded from using these tools because of the high costs to both build out the system for California counties and to maintain it annually. As a result, CAFB owns the tool it created and is looking forward to sharing it with other communities free of charge.

After implementation of the pilot is underway and producing successful results, the pilot partners will seek to recruit additional counties with which to share FAST and their community-based outreach model. San Diego is a likely target for the first expansion efforts. Because the San Diego population and system are fairly different from the Oakland area, success in these two localities would build a strong case for success in counties across California.

In considering an expansion of benefit screening and assistance provided, CAFB is investigating how FAST could electronically communicate with the National Economic Development Law Center’s Self Sufficiency Calculator to demonstrate to applicants how families identified and assisted through the food stamp outreach program might also benefit from applying for other work supports and move towards economic self sufficiency.
Philadelphia Area Work Supports Pilot Profile

PathWaysPA, launched in 1978 as the Women’s Association for Women’s Alternatives to provide residential and community-based services such as social services, job training and employment assistance to women and their children, houses the work supports pilot in the City of Chester in Delaware County. Chester City is a high poverty area where the majority of households are headed by single parents, many residents are unemployed or underemployed and the resources that families need to improve their conditions are disconnected. As a part of the pilot, PathWaysPA conducts outreach and provides case management support to families, connecting them with public benefits such as food stamps, Children’s Health Insurance Program (CHIP), Medicaid and the Earned Income Tax Credit (EITC). This work supports effort began about five years ago as an outgrowth of its efforts to increase financial education in Philadelphia. PathWaysPA developed an online budget worksheet that would indicate if a family was eligible for public benefits. PathWaysPA also began to educate social service and job training organizations about work supports, to ensure that people were aware of these critical supports when they entered the workforce. A recent grant from the Annie E. Casey Foundation, however, has enabled PathWaysPA to deepen its work supports efforts by using a mobile site methodology to reach social service and job training organizers and employers, collecting more data in order to track the impact of the program and improve service delivery.

When PathWaysPA first launched its work supports program, Pennsylvania did not have an online screening program. As a result, only 20% of the customers served by PathWaysPA were pre-screened for benefits. In 2006, the state launched its online screening program, and PathWaysPA registered as a community partner. As a Department of Public Welfare community partner, PathWaysPA can now also help its customers complete and submit their benefit applications electronically during in-office meetings. They are encouraging the state to waive the requirement that the applications being completed during face-to-face meetings so that they could also complete and submit applications for customers during phone interviews. This would greatly increase access for their customers who, because of work schedules, child care issues, transportation and other reasons, find it difficult to come in for meetings.

PathWaysPA has enjoyed a good working relationship with the County Assistance Office (CAO) in Chester since it began its work supports program. When a new staff person joined the county systems office recently, they were able to deepen that relationship. The CAO is willing to share data on the customers served by PathWaysPA, including whether or not their application was certified and what benefit amount they are receiving. This will enable PathWaysPA to track the impact of their efforts on families and their ability to meet their basic needs on a monthly basis.

The Department of Public Welfare is a critical partner. It funds some of PathWaysPA’s financial education publications and the EITC campaign. It also works with PathWaysPA to ensure that its self sufficiency worksheet is correctly aligned with the state system. The state’s support has also enabled them to recruit VISTA volunteers who now support outreach efforts.

PathWaysPA partners with a variety of organizations and public agencies in the City of
Chester and throughout Delaware County. Those partners, including Head Start, Healthy Start, Family Start, Career Link, Legal Aid of Southeastern Pennsylvania, the Chester Economic Development Agency, United Way of Southeast Delco, local food pantries and the two area housing authorities, provide outreach assistance and host PathWaysPA financial education workshops.

PathWaysPA sees the work supports pilot as being one strategy among many to help families move forward financially so they are less at risk. They offer financial education workshops to inform families about resources and strategies that can help them achieve economic success. They have developed education materials, including a financial education guide and a self sufficiency worksheet that shows people what benefits they might be eligible for and how changes in their income and expenses could impact their benefits eligibility and their self sufficiency. Their *Paths to Self Sufficiency* booklet also provides information on various careers, the background and education that is required and the pay scales they offer in order to help people identify new career opportunities.

PathWaysPA collects demographic data on its intake form and income and expense data on its online budget worksheet. An Access database tracks the services PathWaysPA provides, application status, referrals and additional contacts are tracked in an Access database. Paper intake forms are used, and the information is then later manually entered into the database. PathWaysPA also maintains paper records with detailed progress notes on each customer in a locked file cabinet. From these data sources, PathWaysPA produces regular reports, analyzing the impact of their work on a monthly, quarterly, annual and cumulative basis. In the past 21 months, PathWaysPA has assisted 910 people. Approximately 400 of those were people who received counseling over the phone. Approximately 200 were workshop participants who did not choose to enroll in individual case management and counseling. Approximately 150 of them were workshop participants who did choose to enroll in PathWaysPA’s programs. PathWaysPA pre-screened 156 of those customers for food stamps and continues to work closely with 111 of them.

PathWaysPA has set a target of having contact with at least 500 individuals in 2007 and to complete food stamp applications for at least 300 of those. This coming year, they will also seek to partner with employers in order to ensure that their employees are receiving all work supports for which they are eligible. By working with the Delaware County Department of Commerce, they have begun to identify employers that would be good targets, including child care centers, health care providers and supermarkets that tend to employ large numbers of low income workers. Recognizing the need to build support for public benefits, PathWaysPA is also reaching out to local elected officials to ensure that they are aware of the importance of various work supports and the lessons learned and impact of PathWaysPA’s pilot effort. PathWaysPA has collaborated with an elected State Representative to conduct regular, weekly office hours in the Representative’s office. These office hours are used to provide education and information on public benefits, free tax preparation services, and financial education.
Seattle Work Supports Pilot Profile

The Food Stamp - Employment and Training (FSET) pilot, a collaboration of seven area organizations that are seeking to provide low-income residents with workforce development and work supports, is launching a pilot to draw on resident networks and leaders to increase take up rates of food stamps, employment and training programs, and other work supports in the neighborhoods of White Center and Boulevard Park. The FSET collaborative includes Airport Jobs, Goodwill, South Seattle Community College, YWCA, Refugee Federation Service Center, Seattle Jobs Initiative, and the Washington State Department of Social and Health Services (DSHS).

FSET began targeting the White Center/Boulevard Park neighborhoods to connect eligible residents with food stamps, employment and training services, and other work supports in late 2005. White Center and Boulevard Park are neighborhoods on the outskirts of Seattle comprised of a very diverse group of residents. More than 25% of residents are first generation immigrants from around the world, including Bosnia, Somalia, Vietnam, and Mexico among many other countries of origin. Many of these new immigrants came to the country as refugees, fleeing conditions of famine, war, political unrest and dictatorships. Their confusion about American systems and cultural isolation pose barriers for connecting them with critical supports such as food stamps. Despite their targeted efforts, only 81 individuals placed in jobs resided in the two target neighborhoods.

Making Connections recognized the need to rethink the outreach efforts. Rather than relying on the traditional outreach strategies of announcements at community meetings and flyers, Making Connections proposed drawing on existing resident leadership and social networks because they are more effective in reaching immigrants and refugees. They invited the Trusted Advocates to craft a resident-led, community-based outreach pilot that simultaneously increases awareness and take up of food stamps, FSET, and/or related employment and training programs, and builds an informal referral system in which trained resident leaders refer people to additional resources to meet their needs while also outlining ways that the FSET collaborative organizations could build stronger connections with the Trusted Advocates and community. The Trusted Advocates are a group of indigenous community leaders representing the diverse multi-ethnic, multi-cultural communities in White Center and Boulevard Park that have been an integral part of Making Connections in Seattle. During its seven years in Seattle, Making Connections has learned that it is important to engage resident leaders in a true partnership around the planning and implementation of programs when targeting multi-lingual, multi-ethnic communities.

Plans call for resident leaders to be paid to conduct outreach and oversee the pilot's implementation. The resident leaders will receive intensive training about area workforce and asset programs so that they can build awareness of food stamps and work supports in the community and refer residents to other lesser known resources that meet their workforce and asset building needs. Because these resident leaders are already active in their community, this outreach work could easily be integrated with their current work.
As a part of the pilot, the Trusted Advocates will seek to reach out to at least 1,000 residents during 2007 with the goal of at least 200 of those enrolling in food stamps, FSET, and/or related employment and training programs. The Trusted Advocates will be responsible for maintaining a log of who they talk with, how they connected with them, the issues they were facing, their ethnicity, where they were referred and other relevant data. Initially, this log will be on paper but they hope to develop an electronic tool moving forward.

As residents are referred to FSET partners, those partners will collect additional information that will track the pilot’s performance, including referrals between the FSET partners. This information will be maintained on a database system that they are purchasing from the Casey Foundation. Because of increased pressure from the state for all recipients of work supports to be employed, the end goal for all FSET partners will be to help move the people they work with into job opportunities.

Because of the structure of the food stamps system in Washington State, the outreach workers will only be able to share information with residents about available benefits and refer them to the FSET partners for eligibility pre-screenings. All residents will still be required to go through DSHS to confirm eligibility and to submit an application. FSET hopes to eventually influence the state to develop an online application tool to enable greater ease and access to food stamps. Current tools only enable pre-screening. The Paul G. Allen Family Foundation has indicated an interest in helping the state move towards online eligibility determinations and application submissions. FSET will seek to work with Allen in support of this shared goal.
Seedco Work Supports Pilot Profile

For 20 years, Seedco, a national nonprofit organization based in New York City, has worked with local partners across the US to create economic opportunities for disadvantaged job seekers, workers and neighborhood entrepreneurs. Towards that goal, it launched *EarnBenefits®,* a program design to connect low-wage workers to benefits using an online screening and application tool in New York City in 2005. *EarnBenefits* helps low-wage workers access over 30 federal, state, local public and private benefit programs, including the Earned Income Tax Credit, food stamps, public health insurance and child care subsidies. Since its launch in New York City, *EarnBenefits* has been expanded to operate in Memphis, Atlanta, Baltimore and Buffalo. (For more information on *EarnBenefits* in Atlanta, see the Atlanta Work Supports Pilot profile.)

Now entering its third year of implementation in NYC, *EarnBenefits* has screened more than 280,000 individuals for work supports. Seedco has verified that more than 15,000 of those individuals received at least one benefit as a result. In total, $25 million has been put in the hands of low-income New Yorkers as a result of this online tool.

In New York Seedco is able to achieve these results by working in partnership with the NYC Human Resources Administration Department of Social Services (HRA), the Internal Revenue Service, community and faith based organizations, WorkForce One Career Center One Stops, employers, utility companies and financial institutions from across the city. Eighteen community and faith based organizations are contracted to screen and certify eligible individuals in their service populations for work supports using *EarnBenefits*. Each of these contractors works in partnership with Seedco to design a program model and to set performance targets based upon the population they are currently serving. They then receive a grant that is tied to their reaching those targets. Each month, the contractors review their numbers with Seedco to measure their performance against the targets and identify strategies to improve, address challenges and/or build on successes. Seedco also sends staff to Career Center One Stops and area employers to connect low-wage workers with benefits.

The community and faith based organizations are all rooted in communities, providing multiple services to their target populations. They come from a wide variety of traditions, ranging from Settlement Houses founded in the late 19th century to community development corporations that have expanded their scope of work. As a result of this broad, community-based outreach network, the demographics of those served by *EarnBenefits* mirror those of the City, including large numbers of African Americans and Hispanics. By operating in both community organizations and One Stops, Seedco is also able to connect with significant numbers of both female heads of households, men and single individuals from across a wide range of income levels.

One key to Seedco’s success has been identifying the “hook,” the service or product that people really want, that will attract potential customers. This strategy informs its selection of contractors. By partnering with organizations that already have a proven track record in attracting low-income populations, Seedco is able to significantly expand the number of individuals being screened for benefits. For example, co-locating *EarnBenefits* in VITA sites has led to large numbers of low-income workers being screened for additional benefits.
Having facilitated enrollment contracts with government agencies, including the US Department of Agriculture, New York Department of Health and the New York Department of Banking, has also been a factor in Seedco’s success. These contracts allow partner organizations to both screen and enroll applicants for some benefits, including food stamps, CHIP and Medicaid. In VITA sites for example, EarnBenefits can simultaneously help people apply for benefits, file taxes and qualify for the EITC, a valuable, time-saving service.

EarnBenefits enables Seedco to track and measure the impact of its efforts. With approximately 150 staff people in partner sites across the city trained to use the software, EarnBenefits collects and retains data on the people being served, including household size, income, assets and work status. It also collects data on the services provided to each customer, including the benefits for which they were screened, whether they were determined to be eligible, if they applied for those benefits and if they received them.

As a part of its contracts with HRA, Seedco is also able to track the impact on job retention of connecting people with work supports. The HRA contracts require that the customer be placed in a job and Seedco is compensated based upon whether or not the customer retained that job for one, three, six or more months. Seedco offers free metro cards to customers who come in to show their most recent pay stub at each of those intervals and tracks those retention levels. The data shows that Seedco’s customers who access work supports have higher levels of job retention and lower levels of returning to public assistance. Seedco believes that ensuring that eligible individuals and families are receiving the full array of work supports are integral to increasing job retention.

Seedco’s demonstrated results have begun to influence the City. When city leaders released this year’s Welfare to Work RFP, it included language that asked applicants to show how they would help their customers access work supports. Seedco hopes that this new city wide requirement will take efforts to increasing access to work supports to massive scale.

Seedco hopes to use technology to complement how work supports are offered in New York City and across the state. By partnering with the NYC and NY State agencies who are using benefit tools, Seedco is working to link its community based benefit access model to the streamlined systems being developed by government partners. Because EarnBenefits works with clients over time, the data Seedco collects is able to track the impact that works supports have in helping low-wage workers access employment and move on to better jobs. This data is an important complement to the benefit uptake data collected by government agencies.

In addition to screening at least 10,000 people for work supports and connecting at least 7,000 of those to one or more benefits in 2007, Seedco also expects to continue expanding the reach of EarnBenefits into additional geographic communities such as Queens where current coverage is limited and into new populations such as non-English speakers.
GRANT TEMPLATE

This attachment will help you identify, target, and organize funding sources as well as help you apply for grants.
(This form helps staff identify and track funding.)

<table>
<thead>
<tr>
<th>Evaluation of current and potential funding sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assemble your team, decide on roles:</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>List current funding sources, how their funding guidelines fit your new project, and any deadlines for applying:</td>
</tr>
<tr>
<td>Current funders:</td>
</tr>
<tr>
<td>Funding guidelines:</td>
</tr>
<tr>
<td>Deadlines:</td>
</tr>
<tr>
<td>List potential new funding sources:</td>
</tr>
<tr>
<td>Fed./State/Local:</td>
</tr>
<tr>
<td>Private:</td>
</tr>
<tr>
<td>In-Kind:</td>
</tr>
<tr>
<td>List current partners who can assist with generating new funding:</td>
</tr>
<tr>
<td>Public:</td>
</tr>
<tr>
<td>Private:</td>
</tr>
<tr>
<td>List potential partners who can assist with generating new funding sources:</td>
</tr>
<tr>
<td>Public:</td>
</tr>
<tr>
<td>Private:</td>
</tr>
<tr>
<td>Direct Fundraising (event hosting, Campaigns)</td>
</tr>
<tr>
<td>Events:</td>
</tr>
<tr>
<td>Campaigns:</td>
</tr>
</tbody>
</table>
(This form is a template you can follow to write a grant.)

Grant Application Instructions:

- Please answer all questions asked by the granting organization in the order listed. If there is no list of questions, use the template enclosed.
- Please use the headings provided by the granting organization or in this form.
- Please submit only one copy or the number of copies requested.
- Please do not include any materials except those specifically requested.

This template has been adapted from the New York/New Jersey Common Application form. You can find a copy of the form at http://www.nyrag.org/info-url2335/infourl_list.htm?category=For%20Grantseekers&doc_id=34417. If the organization you are working with has already given you a template, please refer to their template instead.

Application Cover Sheet:

- Date of application:
- Name of organization to which grant would be paid (Please list exact legal name):
- Purpose of grant (Only one sentence):
- Address of organization:
- Telephone number:
- Fax:
- E-mail:
- Executive Director:
- Contact person and title (If not executive director):
- Is your organization an IRS 501©(3) not-for-profit? (Type yes or no):
- If no, please explain:
- Grant request: $
- Choose one:
  __ General support
  __ Project support
- Total organizational budget (For current year): $
- Dates covered by this budget (Month/Day/Year):
- Total project budget (If requesting project support): $
- Dates covered by project budget (Month/Day/Year):
- Project name (If applicable):

Grant Proposal Format

I. PROPOSAL SUMMARY: One-half page, maximum
Please summarize the purpose of your agency. Briefly explain why your agency is requesting the grant, what outcomes you hope to achieve, and how you will spend the funds if you receive the grant.

II. NARRATIVE—Five pages, maximum
A. Background—Describe the work of your agency, addressing each of the following:

1. A brief description of its history and mission
2. The need/problem that your organization works to address, and the population it serves, including geographic location, socio-economic status, race, ethnicity, gender, sexual orientation, age, physical ability and language
3. Current programs and accomplishments. Please emphasize the achievements of the recent past
4. Number of paid full-time staff; number of paid part-time staff; number of volunteers
5. Your organization’s relationships — both formal and informal — with other organizations working to meet the same needs or providing similar services

(Please explain how you differ from these other agencies)

B. Funding Request—Please describe the program for which you seek funding.

1. If applying for general operating support, briefly describe how this grant would be used
2. If your request is for a specific project, please explain the project including:
   - A statement of its primary purpose and the need or problem that you are seeking to address
   - The population that you plan to serve and how this population will benefit from the project
   - Strategies and activities that you will employ to implement your project
   - The proposed staffing for the project, and the names and titles of the people directing the project
   - Anticipated length of the project
   - How the project contributes to your organization’s overall mission

C. Evaluation—Please explain how you will measure the effectiveness of your activities. Describe your criteria for a successful program and the results you expect by the end of the funding period.

III. ATTACHMENTS—Please label all attachments to correspond to the bold-faced, capitalized items below.

A. Financial Information—Please provide the dates that each document covers.

1. The MOST RECENT FINANCIAL STATEMENT, audited if available. This statement should reflect actual expenditures and funds received during your most recent fiscal year
2. OPERATING EXPENSE BUDGETS for the current and most recent fiscal year
3. A LIST OF foundation and corporate SUPPORTERS and all other sources of income, with amounts, for your current and most recent fiscal year
4. Please list the foundations, corporations, and other SOURCES that you are SOLICITING FOR FUNDING and, to the best of your knowledge, the STATUS OF YOUR PROPOSAL with each
If project funding is requested:

5. **A CURRENT EXPENSE BUDGET FOR THE PROJECT.** List each staff line separately and include % of time spent on project. Indicate the specific uses of the requested grant, if possible
6. A list of all **SOURCES OF INCOME** toward the project, actual and prospective with amounts

B. Other Supporting Materials

1. A list of your Board of Directors, with their affiliations
2. A copy of your most recent IRS letter indicating your agency’s tax-exempt status, or, if not available, an explanation
3. One-paragraph resumes of key staff, including qualifications relevant to the:
   - Specific request
   - Your most recent annual report, if available
   - No more than three examples of recent articles about, or evaluations of, your organization
MEMORANDUM OF UNDERSTANDING

This Memorandum can be used to formalize partnerships with other organizations.
Memorandum of Understanding
For Project ---------

_(Partner organization)_ understands that PathWaysPA, Inc. is seeking funds to increase the ability to provide self-sufficiency tools and practices to clients seeking employment and other services.

We (the partner organization) further understand that if PathWaysPA receives the desired funding for these efforts, we agree to provide up to ## staff who will receive orientation and training on the Self-Sufficiency tools and materials.

In addition, PathwaysPA will conduct a minimum of ## group sessions/workshops for our clients, to be co-facilitated by PathwaysPA Project staff and the above-referenced staff from our organization following their orientation and training.

PathWaysPA will work closely with our staff to help individuals create and implement realistic plans for self-sufficiency and family financial stability. Client outcomes will be tracked through direct observation, and follow-up surveys with the organization, staff, and clients.

We also agree to provide feedback concerning the effectiveness of the project which may take the form of staff surveys and or interviews to facilitate the re-design of materials and to support ongoing evaluation of program results.

We are in agreement with all of the above statements and enter into this Memorandum of Understanding.

____________________________________ _______________
Agency Representative Date

____________________________________ _______________
PathWaysPA, Inc. President and CEO Date
TOOLS FOR STAFF

Included are sample screening tools and other materials for staff to use in providing work supports.
(This Transmittal Log is used to accompany the applications and by the manager at the food stamp office to track applications)

<table>
<thead>
<tr>
<th>Application Center Name: Kingsley House</th>
<th>Mo./Year</th>
<th>Sheet No. of</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant's Name, Telephone Number and Social Security Number</td>
<td>Initial Contact Date with Applicant</td>
<td>Interview Date</td>
</tr>
<tr>
<td>1.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SS#</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SS#</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SS#</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SS#</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SS#</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SS#</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

I certify that the information recorded on this log represents Food Stamp Activity completed by our organization:

Administration Signature

Date
List each staff line (This form is accompanies benefits applications and is used by the manager at the food stamp office to track applications)

APPLICATION FOR PUBLIC BENEFITS

CLIENT:

PHONE:

ADDRESS:

ADMISSION DATE:

<table>
<thead>
<tr>
<th>BENEFIT</th>
<th>*PRESCREEN</th>
<th>*APPLIED</th>
<th>COMPASS</th>
<th>PAPER AMOUNT</th>
<th>*AWARDED</th>
<th>DENIED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Stamps</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical Assistance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TANF</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Assistance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Childcare Assistance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LIHEAP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

COMPASS APPLICATION #:

REAPPLICATION:

APPEAL:

COMMENTS:

*NOTE: Enter Dates for PRESCREEN, APPLICATION and AWARDED.
Enter estimated benefit in AMOUNT.
**FOOD STAMP OUTREACH PROJECT**

**PRE-SCREENING FORM**

(Testing helps staff prescreen clients to see if they are eligible for benefits.)

- Date: __________________________
- Client Name ________________________
- Address ____________________________
- City __________________ Division Zip ________
- Phone Number ________________________ OK to leave message? YES / NO
- Date of Birth _________________________

How did you hear about us? __________________________

Are you applying for just yourself or your family? ______________________________________

If family, how many people are in your family? __________________________

**Are there any of the following types of people in your house?** (Please circle all that apply)
- Children (under 18)          - Workers          - Students (post high school)
- Elderly (60 and over)        - Strikers          - Disabled          - Immigrants

If working, how often do you get paid? __________________________

How much do you get each paycheck? (Before Taxes): __________________________

Do you have a bank account? YES / NO

If yes, do you have more than $2,000 ($3,000 if over 60 or disabled) in it? YES / NO

Do you have more than one car? YES / NO

**Is anyone in the household currently receiving any of the following benefits?**
(Please circle all that apply)
- SSI / SSD / Cash Assistance (TANF/GA) / Social Security / Child Support / Unemployment
- Worker’s Comp / Pension / Other __________________________

**How much do you receive for each of the above benefits?**

__________________________

__________________________

__________________________

How often? __________________________
1. Does everyone in the household receive TANF, GA or SSI? YES / NO
2. Do you pay for child care or dependent care? YES / NO
   a. If yes, how much do you pay? _________________________________
   b. How often do you pay? _______________________________________
3. Do you pay court ordered child support? YES / NO
   a. If yes, how much do you pay? _________________________________
   b. How often do you pay? _______________________________________
4. How much is your monthly rent/mortgage? __________________________
5. How much do you pay for utilities a month?
   Water _________________________________
   Electric _______________________________
   Gas _________________________________
   Phone _______________________________
   Oil _________________________________
   Property Taxes __________________________
   Homeowners Insurance ____________________
6. Do you pay for any regular medications or medical supplies? (over 60 or disabled ONLY)? YES / NO
   If yes, how much do you pay monthly?_______________________________

For Office Use Only

Client SSN:__________________________________________
1. Is the client eligible for food stamps? YES / NO
   If YES: How much is client potentially eligible for?_______________
   Is client eligible for expedited? YES / NO
   If NO: Why isn't client eligible? Income too high / Expenses too low
   Other:______________________
2. Did you fill out the Food Stamp Application with the client? YES / NO
   If YES: Which type of application? Paper / COMPASS

Note: Maximum child or dependent care is $200/month per child under 2; $175/month per child over 2
(This form helps staff prescreen clients to see if they are eligible for benefits.)

**FOOD STAMP OUTREACH PROJECT PRE-SCREENING FORM**

<table>
<thead>
<tr>
<th>A</th>
<th>Volunteer Name: ______________________ Date: _________ Site: __________</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>Client Name____________________________________</td>
</tr>
<tr>
<td></td>
<td>Address_________________________________________</td>
</tr>
<tr>
<td></td>
<td>Zip_________________________ City ____________</td>
</tr>
<tr>
<td></td>
<td>Phone Number_________________ OK to leave message? YES / NO</td>
</tr>
<tr>
<td></td>
<td>Date of Birth_________________ SSN_________________</td>
</tr>
<tr>
<td>C</td>
<td>How did you hear about us?________________________</td>
</tr>
<tr>
<td>D</td>
<td>Are you applying for just yourself or your family?__________________</td>
</tr>
<tr>
<td></td>
<td>If family, how many people are in your family?_________________</td>
</tr>
<tr>
<td></td>
<td>Are there any of the following types of people in your house? (Please circle all that apply.)</td>
</tr>
<tr>
<td></td>
<td>Children (under 18)  Workers  Students (post high school)</td>
</tr>
<tr>
<td></td>
<td>Elderly (60 and over)  Strikers  Disabled  Immigrants</td>
</tr>
<tr>
<td>E</td>
<td>Is anyone in the household currently receiving any of the following benefits? (Please circle all that apply.)</td>
</tr>
<tr>
<td></td>
<td>SSI / SSD / Cash Assistance (TANF/GA) / Social Security / Child Support /</td>
</tr>
<tr>
<td></td>
<td>Unemployment / Worker's Comp / Pension /</td>
</tr>
<tr>
<td></td>
<td>Other_________________________</td>
</tr>
<tr>
<td>F</td>
<td>Do you have a bank account?______________ If yes, do you have more than $2,000 ($3,000 if elderly or disabled) in it? YES / NO</td>
</tr>
<tr>
<td></td>
<td>Do you have more than one car? YES / NO</td>
</tr>
<tr>
<td>G</td>
<td>How much do you make monthly at your job(s) (Before Taxes):$__________</td>
</tr>
<tr>
<td></td>
<td>Unearned Income: $__________ Gross Monthly Income (earned + unearned): $__________</td>
</tr>
</tbody>
</table>

3. Is the client eligible for food stamps? YES / NO
   If YES: How much is client potentially eligible for? ________________
   Is client eligible for expedited? YES / NO
   Which district office was the client referred to? ________________
   If NO: Why isn’t client eligible? Income too high / Expenses too low
   Other: ____________________

4. Did you fill out the Food Stamp Application with the client? YES / NO
   If YES: Which type of application? Paper / COMPASS

5. Did you review the application checklist with the client? YES / NO

6. Did you submit the application online? YES / NO

NOTE____________________________________________________________________________
(This form helps track who is using IT equipment and when.)

LAPTOP/PROJECTOR EQUIPMENT REQUEST

Requested By:__________________________________________________________

Approved By:___________________________________________________________

DATE REQUESTED_____________________________________________________

LAPTOP ID #__________________________________________________________

DATE OF RETURN______________________________________________________

EMPLOYEE SIGNATURE___________________________________________________

IT VERIFICATION________________________________________________________

Special Notes

For IT Use Only

Completed

Date ____________________________

43
OUTREACH TO PARTNERS

Letters and agendas used as part of contact with local partners.
December 11, 2006

Name
Job Title
Street Address
City, State Zip

Dear Community Partner:

As winter weather sends temperatures plummeting and heating bills soaring, many people in Delaware County will grapple with paying the heating bills or putting food on the family table.

The Food Stamp Program at PathWaysPA funded by the United States Department of Agriculture (USDA) can help working families’ funds go farther by helping them to purchase the healthy, nutritious food they need in order to pay heating bills. At PathWaysPA, we are working hard to raise awareness about food stamp benefits in our community. We were recently awarded a grant from the USDA to provide food stamp outreach and help people apply for food stamps in Delaware County.

PathWaysPA can provide pre-screenings to individuals to determine food stamp eligibility at your site. We also have a hotline (610) 543-5022 to pre-screen for food stamp benefits over the phone.

Enclosed are fliers about the Food Stamp Outreach Program for you to copy and distribute. In addition, we have included fliers about the upcoming Volunteer Income Tax Assistance (VITA), a free income tax preparation service which can also be offered at your site to your constituents or through the Delaware County Asset and Development’s (DelcoAD) eight walk-in sites.

If you would like to order marketing materials, which advertise our hotline, host a presentation or schedule on-site screenings, please contact XXX.

Sincerely,

XXX
Program Manager

Enc.
Advisory Group
June 22nd, 2007
9:30am-11:30am

I. Welcome and Introductions

II. Funders
   • Casey
   • USDA

III. Outreach Strategies
   • Outreach tables
   • Financial education – New Choices/New Options, EDSI
   • Phone calls – Press Releases
   • Cover All Kids
   • Summer Health Fairs
     i. Update: Health Fair – June 2nd at the Shoprite of Eddystone

IV. Database Update - Evaluation

V. Policy Update – Postcards for Progress

VI. Mobile VITA Tax Site Results

VII. Announcements

Next Meeting: Friday July 20th, 2007, 9:30am-11:30am
PRESS RELEASES

These press releases have been used to reach out to the media about important programs and advocacy issues.
Food Stamp Program Marks 30th Anniversary
—Grant from Annie E. Casey Foundation to Alameda County Community Food Bank
Aids in Application Assistance—

17 May 2007 -- (Oakland, CA) — Thirty years ago on May 24, 1977 the landmark Food Stamp Act was signed into law by President Carter. Created in response to the extreme hunger and medical problems related to malnutrition that were common in the 1960’s, it has become one of the most successful and effective safety-net programs that has made that kind of severe hunger rare in our country.

“For 30 years, the Food Stamp program has been the cornerstone of our nation’s effort to end hunger,” said Congressman Pete Stark. “This anniversary is cause to celebrate the millions of lives that food stamps have saved and improved. But we must also acknowledge that much more needs to be done to lift all families out of poverty. I commend the ongoing efforts of the Alameda County Food Bank toward this goal.”

With a $50,000 grant from the Annie E. Casey Foundation, the Alameda County Community Food Bank is building on the success of its food stamp outreach efforts, targeting eligible residents living in Oakland’s San Antonio Neighborhood district. Bilingual staff who speak Vietnamese, Spanish, Mandarin and Cantonese are conducting food stamp screening and application assistance in the neighborhood where the participation rate is only 12 percent of those who may be eligible. The Food Bank has helped double food stamp participation among eligible households in Oakland from 2001 to 2006, the largest increase in participation among all cities surveyed nationwide, according to a recent Food Research and Action Center (FRAC) survey.

Less than half of Alameda County low-income residents who are eligible are enrolled in the program, either because they do not know they may be eligible or because the barriers are too great. Food stamp participants have to meet strict income and asset limits and in California, undergo fingerprinting and a rigorous application process before being approved for food stamps. It usually takes 30 to 60 days after an application is submitted to find out if one is approved or denied. Benefits are then retroactive to date of application. Alameda County residents who are interested in pre-screening for food stamp eligibility can call the Food Bank’s toll free number, 800-870-3663.

The average benefit for a food stamp recipient in Alameda County is $84 per month per person and generates millions of federal dollars in food purchasing power. According to the USDA, every food stamp dollar creates $1.84 in local economic activity.

In July of this year, Congress will make decisions about the future of the Food Stamp Program as part of the 2007 Farm Bill reauthorization. Food stamp benefits have not increased since 1996, resulting in a decrease in food stamp purchasing power each year. Annually 26 million people in America, including 240,000 in Alameda
County, rely on emergency food. The Alameda County Community Food Bank, along with other food banks and organizations across the United States, is calling on Congress to reverse the erosion of benefits when it renews the program this year.

Food Stamp Facts *(According to a 2005 study by the California Food Policy Advocates)*

- The Food Stamp Program helps 26 million people across America buy food every month, including 83,000 people in Alameda County.
- Only 60 percent of eligible households in Alameda County participate in the program.
- The average participant receives about $1 per person per meal in benefits.
- Household gross income level must be below 130 percent of the federal poverty limit.
- Most families receiving food stamps in California are the working poor.
- Food Stamp benefits now come in the form of a plastic card, called EBT (Electronic benefit Transfer), which has all but eliminated fraud and made it easier to shop for groceries.

To learn about the history of the food stamp program, view the food stamp video “Making America Stronger” narrated by Jeff Bridges at www.cbpp.org/foodstamp-video.htm or visit www.frac.org. For more information about food stamps in California, visit California Food Policy Advocates at www.cfpa.net.

**GENERAL INFORMATION**

The *Annie E. Casey Foundation*, located in Baltimore, Maryland, is the 15th largest private foundation in the United States with assets of more than $3 billion. We rank 19th in the nation for charitable giving. Established in 1948 by Jim Casey, founder of UPS, the Foundation is the world’s largest philanthropy dedicated to improving the lives of disadvantaged children. For information, visit [www.aecf.org](http://www.aecf.org).

Established in 1985, the *Alameda County Community Food Bank* is located at 7900 Edgewater Drive in Oakland and is open M-F, 8:30 am – 5 pm. The Food Bank works with 300 community based organizations, including soup kitchens and food pantries, to provide emergency food assistance to 40,000 people in need each week. In addition to food distribution, the Food Bank works to break the cycle of poverty and hunger through education and advocacy efforts. For more information, call *(510) 635-3663* or visit [www.accfb.org](http://www.accfb.org).
MEDIA ADVISORY
November 15, 2006

Contacts:

<table>
<thead>
<tr>
<th>Name</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Title</td>
</tr>
<tr>
<td>Organization</td>
<td>Organization</td>
</tr>
<tr>
<td>Phone</td>
<td>Phone</td>
</tr>
<tr>
<td>Email</td>
<td>Email</td>
</tr>
</tbody>
</table>

FOOD STAMPS HELP WORKING FAMILIES IN DELAWARE COUNTY

As winter weather sends temperatures plummeting and heating bills soaring, many people in Delaware County will grapple with paying the heating bills or putting food on the family table.

The Food Stamp Program funded by the U.S.D.A can help working families’ funds go farther by helping them to purchase the healthy, nutritious food they need in order to pay heating bills.

At PathWaysPA, we are working hard to raise awareness about food stamp benefits in our community. We were recently awarded a $xxxx grant from the USDA to provide food stamp outreach and help people apply for food stamps in Delaware County.

Many people have a difficult time making ends meet, but by helping out with the grocery bill, food stamp benefits allow recipients to use their limited income on other important basic needs like housing, child care, medical costs, transportation, and utilities. PathWaysPA can provide pre-screenings to individuals to determine food stamp eligibility. Help us get the word out that food stamps make Delaware County stronger. Just call xxx

Thank you in advance for helping our community “eat right when money’s tight.”

###
Local Man Proves Food Stamps Can Be of Help

UPPER DARBY, PA—Do you perhaps think you are not eligible because someone in your family is working? Do you feel as though you are forced to choose between putting food on your table and paying the bills?

Michael Nixon, of Upper Darby, is out of work and his wife works part-time. While he was out one day searching for a job, he saw a flier from PathwaysPA that promoted assistance with food stamp applications. “I thought I had nothing to lose by applying,” he said. “During my appointment, they completed the application on the computer right away and they faxed in all of my information to the County Assistance Office.”

“I thought that I would not be eligible for food stamps because my wife works part-time. It turned out that I was eligible for food stamps,” said Nixon. “Even if you work, you might be eligible for food stamps,” said Jacqueline Patterson, Director of the Self-Sufficiency Projects at PathWaysPA. “Most working families and individuals are not aware they may be eligible, so they do not apply.”

Nixon no longer has to choose between trying to figure out how to pay the bills and paying for food. “I learned one important thing from this,” he said. “Food stamps are not a part of the welfare program. You just apply for them through the welfare office. They are a program meant to help people keep food on the table while they work to get back on their feet.”

He continued, “I used to think that people on food stamps were out there trying to beat the system. I know differently, now. I am using the system to help me keep going until I get another job, and that’s what food stamps are for.”

Do you work and still have trouble putting food on your table? Have you thought that it would be too difficult to apply for food stamps? Call PathWaysPA and see if you might be eligible today at (610) 543-5022.

PathWaysPA began in 1978 as the Women’s Association for Women’s Alternatives, one of Pennsylvania’s first residential programs to keep low-income, vulnerable women together with their children. It has grown to become one of the Greater Philadelphia region’s foremost providers of residential and community-based services for women and their children.
Do You Want Your Children To Do Better in School?

During National School Breakfast Week, a local organization reminds families that free/reduced price meals are available to families earning even $38,000/year

Holmes PA.—Parents – there is an easy way to improve children’s math and reading scores, moderate their classroom behavior, and help them be happier and more active throughout the day. It is not a new prescription drug medication, technological breakthrough, or meditation technique.

Just have them eat breakfast.

During National School Breakfast Week, which runs from March 3-7, 2008, PathWaysPA is reminding parents that a healthy breakfast is available to help children succeed, for little or no cost.

At a time when even middle-income families are struggling to find ways to keep the house warm, pay the mortgage, and feed their children, the National School Breakfast Program can help alleviate hunger fears by providing a healthy meal for kids at low or no cost to their parents.

Many studies link access to nourishing meals with a higher chance for learning and success in school. According to the United States Department of Agriculture (USDA), at least one-quarter of a school-aged child’s daily nutrient requirements are provided by school lunch.

“Most families know that eating breakfast is an important part of helping their children succeed,” said Lynda Kugel, Director of Self-Sufficiency Projects at PathWaysPA. “What they don’t realize is that programs exist that allow children to receive free or reduced price meals at school. Right now, even a family of four earning $38,203 can qualify for reduced price meals.”

PathWaysPA assists individuals and families in the region to apply for the federal USDA food stamp program, and can assist families to apply for both the food stamp program and school breakfast program. “Any family receiving food stamps is automatically eligible for the school breakfast and lunch program – they just need to apply for the program separately,” said Vernice Lloyd, Family Advocate at PathWaysPA. “The process to apply for school meals or food stamps is straightforward. We can help families with an online application which takes about a half hour to complete.”

Are you interested in learning more about the National School Breakfast Program, USDA food stamp program or other resources? If so, call PathWaysPA at (800) 209-2914 today!

PathWaysPA began in 1978 as the Women’s Association for Women’s Alternatives, one of Pennsylvania’s first residential programs to keep low-income, vulnerable women together with their children. It has grown to become one of the Greater Philadelphia region’s foremost providers of residential and community-based services with a focus on serving women, teens and children. Each year PathWaysPA serves nearly 5,000 clients with a full complement of social services, job training and employment assistance; as well as residential programs.
OUTREACH TO LEGISLATORS

Templates for reaching out to legislators on various issues.
Phone Outreach:

Remember: A phone call is a good way to give a quick statement on a subject – it is not the best way to engage a legislator in a complicated issue. Virtually every time you call a legislator’s office, you will end up talking to a staffer who will note down what you say. The more clear and concise you are, the better you will be. You may want to write down what you have to say beforehand to ensure that you include all of the important points.

Sample phone call: Hello, my name is __________ _____________ and I am calling from (organization). I would like to speak to the staffer in charge of (issue you are calling about).

At this point, you may be put into voicemail or you may be asked to speak to whoever picked up the phone. On some occasions, you will actually be transferred to the staffer you are looking for. If you can find out the name of the staffer in charge of an issue, it will be helpful in reaching that person directly.

If put into voicemail:

“Hello, my name is __________ _____________ and I am calling from (organization). I am calling today to ask that (legislator) support/not support (bill #) because (give a short reason). I am a constituent of the legislator/My organization serves clients in the legislator’s district. If you have any questions or concerns, please call me at (phone number).”

If asked to talk to the same staffer you are on the phone with:

“I am calling today to ask that (legislator) support/not support (bill #) because (give a short reason). This is important because (give a reason). I am a constituent of the legislator/My organization serves clients in the legislator’s district.” Pause here to see if there are any questions. “Can I leave you my phone number in case anyone has additional questions?”

If transferred to the staffer in charge of your issue:

“Hello, my name is __________ _____________ and I am calling from (organization). I am calling today to ask that (legislator) support/not support (bill #) because (give a short reason). This is important because (give a reason). I am a constituent of the legislator/My organization serves clients in the legislator’s district.” Pause here to see if there are any questions. “Can I leave you my phone number in case you have additional questions?”
Sample Letter

Date

The Honorable Name
XXX
Washington, DC 20515

Dear Representative XXX:

I am writing to you today to ask for your support in passing and building on the nutrition provisions set forth in the XXX Act of 200X (HR XXXX).

At PathWaysPA, we see the impact of this battle as we work with women and children struggling to reach self-sufficiency. Our Self-Sufficiency Standard, which takes an objective look at the financial obligations a family must meet in order to be self-sufficient, shows that food costs for a family of three (one adult, one preschooler, and one school-age child) in Philadelphia County are $503 each month.

To qualify for food stamps, this family could only earn up to $17,170 per year, which is much less than the $42,503 needed to be self-sufficient. Even if they qualify for the program, the Department of Agriculture reports that most families receive approximately $86 per person per month in food stamps. Families who qualify for the minimum monthly benefit – a category which most senior citizens belong to – only receive $10 per month in food stamps. This allocation has not changed in the past 30 years.

We support HR XXXX because it allocates $4 billion over five years to improve the Food Stamp Program, which will include making the program more accessible. This bill also increases funding for The Emergency Food Assistance Program.

In addition to your backing of the bill as it currently stands, we ask you to build upon it by supporting the addition of $1.6 billion to the nutrition provisions covered in HR XXXX. This funding will allow the Food Stamp Program to keep up with the cost of living in America by stemming the erosion of the standard deduction in the Food Stamp Program. Ultimately, this influx of funds will increase food purchasing power for the many households that struggle to feed their families healthy, affordable food.

Throughout your career, you have made low-income families one of your top priorities. I thank you for your dedication, and hope that you will continue to work for them by supporting and increasing this bill.

Best wishes,

XXX
Introducing/ Reintroducing your organization to legislators

Date

The Honorable XXX
XXX
XXX

Dear Representative XXX:

Congratulations on your recent reelection. As your constituents, we would like to take a moment to reintroduce ourselves and remind you of the services we offer to women and families in your district.

PathWaysPA has three programs in your district at two locations. As a nonprofit organization, we assist over 4,000 women and children each year in achieving economic independence. Our programs endeavor to keep families together, to support parents and their children, to prevent child abuse, and, most of all, to work with families so they can attain self-sufficiency.

Please find included a copy of our 2006 Self-Sufficiency Standard for Pennsylvania, as well as several factsheets regarding self-sufficiency. We especially urge you to review our Online Budget Worksheet, a free service that allows constituents to compare their incomes with their needs and see if they qualify for work supports.

We would be happy to meet with you or your staff to discuss our work in greater detail, and look forward to working with you throughout your term in office.

Very truly yours,

XXX
Sample Testimony

Written Testimony to XXX City Council

Presented by XXX

Organization

Title

Date

Thank you for allowing us to send written comments today. My name is XXX, and I am XXX of PathWaysPA, an agency that has been committed to keeping families together and providing both advocacy and services to and on behalf of at-risk children, teens, women, and families for almost thirty years. We work directly with over 5,000 individuals each year.

In recent years, PathWaysPA has provided statewide outreach promoting the federal Earned Income Tax Credit and Pennsylvania Tax Forgiveness in addition to hosting mobile tax sites in the Philadelphia region. Our experiences have given us the opportunity not only to work better with our clients, but also to advocate for better services and policies to help bring them out of poverty.

Based on our experiences, we know that wage tax relief is of critical importance to low-wage working families in Philadelphia. Families who would be eligible for the tax relief are already making far less than what they need to make ends meet in Philadelphia— they cannot afford to lose the opportunity to keep more of the money they earn and need to support their families.

Throughout the state, PathWaysPA is best known for “The Self-Sufficiency Standard of Pennsylvania.” This Standard is a “yardstick” that takes into consideration real costs in calculating the minimum family income needed to maintain self-sufficiency. Since these costs vary throughout the state, we have calculated the needs of families in all 67 counties, and adjusted the costs accordingly based on family size and configuration.

According to the Standard, a family of one adult, one infant, and one preschooler in Philadelphia needs $44,190 to make ends meet. No fancy vacations, no car, no eating out. Just a two-bedroom apartment, with heat, food on the table, safe child care, and a TransPass to get to work.

Although this wage only covers the necessities, it is still beyond the reach of many Philadelphians. Philadelphia has the highest percentage of low-income working families of any county in the state. In January 2007, PathWaysPA released Investing in Pennsylvania Families: Economic Opportunity for All, which shows that 25 percent of working families earn less than 200 percent of the poverty line, or just over $35,000 for a family of three. This amount is still less than many families need to be self-sufficient,
especially in Philadelphia, where the number of low-income working families is even higher – 42 percent of working families living in Philadelphia are low-income.

In addition to being low-income, families whose earnings fall in the bottom three-fifths of income in our state take on more of the tax burden than wealthier families due to the uniformity clause in our tax code. Even though these families are struggling to make ends meet, they lose more of their income to taxes than better-off families.

In the highly regressive tax system in which Pennsylvanians must operate, there are few rays of light for low-income workers and their families. The Federal Earned Income Tax Credit and, to a lesser extent, the Pennsylvania Tax Forgiveness Program, provide this relief in the form of tax credits to low-income workers. Philadelphians have been waiting for further progressiveness in the form of the Low Income Tax Credit, which after much delay was scheduled to take effect in FY 2013.

However, in the 5 Year Fiscal Plan, this long-awaited tax credit is eliminated, “since the significant tax reductions in several other areas, in conjunction with recent expansions to the Federal Earned Income Tax Credit program, will substantially benefit low-income residents and employees of Philadelphia firms.”

While other tax cuts will benefit low-income Philadelphians, they will not do so at the same level as the Low Income Tax Credit. Under the new wage tax plan, Philadelphia residents will receive a tax rate of 3.80%; under the Low Income Tax Credit, the wage tax would decrease for those who qualify for the Tax Forgiveness Program.

A three-person family earning $25,500 a year (the maximum amount in TY07 this family can earn and qualify for the full Tax Forgiveness Refund) pays $950 per year in city wage taxes under the lowest wage tax proposed. This family, who already earns “too much” for food stamps, makes nearly $20,000 less than a self-sufficient wage. That $950, or any portion thereof, would make a substantial impact in the rent, food, utilities, or childcare costs of the family. Even a 0.05% reduction in the wage tax saves this family more than $100, which could pay for a one-month SEPTA pass.

In his inauguration speech, Mayor Nutter called for changes that could help move hundreds of thousands of families out of poverty, and we have no doubt that he intends to meet that goal. One of the best programs ever created to move people out of poverty in United States history was the Earned Income Tax Credit, which provides tax credits to low-income working families. With the Low Income Tax Credit, Mayor Nutter and City Council have the opportunity to help low-income working families here in Philadelphia move out of poverty and into self-sufficiency. We hope that instead of eliminating the tax credit, they will take the opportunity to heart.
SUCCESS STORIES

This attachment shows you one way to track your clients’ success stories.
<table>
<thead>
<tr>
<th>NAME:</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONTACT INFORMATION:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PHONE:</th>
<th>EMAIL:</th>
</tr>
</thead>
<tbody>
<tr>
<td>SEX:</td>
<td>MARITAL STATUS:</td>
</tr>
<tr>
<td>#/AGE OF FAMILY MEMBERS:</td>
<td></td>
</tr>
</tbody>
</table>

| HOW DID YOU ACHIEVE SUCCESS? (DID YOU IMPROVE YOUR EDUCATION? OBTAIN A JOB? MOVE UP IN A JOB? OBTAIN A BETTER JOB? OR SOMETHING ELSE?) |
| WHAT PROGRAMS ARE/WERE YOU PART OF? |
| TELL US MORE: |

| WHAT OBSTACLES DID YOU OVERCOME ALONG THE WAY? |
| WHAT WOULD YOU RECOMMEND TO OTHER PEOPLE IN YOUR SITUATION? |
| WHAT ARE YOUR FUTURE GOALS? |
| HOW WILL YOU ACHIEVE THEM? |
| DO YOU NEED ANYTHING ELSE TO SUCCEED? (EDUCATION, HIGHER WAGES, BENEFITS, ETC.) |
FLYERS

These flyers are used to provide outreach to the community. In some cases, they include information on the documents people need to bring to sign up for benefits.
Total Health Care at No Cost To You

Louisiana Children’s Health Insurance Program (LaCHIP): You may qualify for LaCHIP if your family earns less than the following amounts each week or month:

<table>
<thead>
<tr>
<th>Number in Family</th>
<th>Weekly income ($)</th>
<th>Monthly Income ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>426</td>
<td>1,702</td>
</tr>
<tr>
<td>2</td>
<td>571</td>
<td>2,282</td>
</tr>
<tr>
<td>3</td>
<td>716</td>
<td>2,862</td>
</tr>
<tr>
<td>4</td>
<td>861</td>
<td>3,442</td>
</tr>
<tr>
<td>5</td>
<td>1,006</td>
<td>4,022</td>
</tr>
<tr>
<td>6</td>
<td>1,151</td>
<td>4,602</td>
</tr>
<tr>
<td>7</td>
<td>1,296</td>
<td>5,182</td>
</tr>
<tr>
<td>8</td>
<td>1,441</td>
<td>5,762</td>
</tr>
</tbody>
</table>

More than 8  For each extra person, add $580 to the monthly amount for 8 people.

Even if your income is higher than the amounts listed your children may still qualify. You can receive deductions for child care payments, child support received and more.

DOCUMENTS NEEDED: For anyone applying we will need: social security numbers, copies of birth certificates, proof of total family income, receipts for the care of a child or disabled adult, proof of expected delivery date for anyone who is pregnant, health insurance cards or benefit letter.

More Food for you and your family!!

Food Stamp Program: If your family earns less than the following amounts each month, you might qualify for food stamps:

<table>
<thead>
<tr>
<th>Household size</th>
<th>Gross monthly income ($)</th>
<th>Net monthly income ($)</th>
<th>Maximum Benefit ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1,107</td>
<td>851</td>
<td>162</td>
</tr>
<tr>
<td>2</td>
<td>1,484</td>
<td>1,141</td>
<td>298</td>
</tr>
<tr>
<td>3</td>
<td>1,861</td>
<td>1,431</td>
<td>426</td>
</tr>
<tr>
<td>4</td>
<td>2,238</td>
<td>1,721</td>
<td>542</td>
</tr>
<tr>
<td>5</td>
<td>2,615</td>
<td>2,011</td>
<td>643</td>
</tr>
<tr>
<td>6</td>
<td>2,992</td>
<td>2,301</td>
<td>772</td>
</tr>
<tr>
<td>7</td>
<td>3,369</td>
<td>2,591</td>
<td>853</td>
</tr>
<tr>
<td>8</td>
<td>3,746</td>
<td>2,881</td>
<td>975</td>
</tr>
<tr>
<td>9</td>
<td>4,123</td>
<td>3,171</td>
<td>1,097</td>
</tr>
<tr>
<td>10</td>
<td>4,500</td>
<td>3,461</td>
<td>1,219</td>
</tr>
</tbody>
</table>

Resource Limit 2,000
(savings/cash on hand)

DOCUMENTS NEEDED: Social Security Cards, verification of identity for head of household, four most recent check stubs, verification of rent or mortgage expense and utility bills, verification of checking, savings or credit union accounts, receipts for child care expenses, verification of scholarships grants and loans for students, verification of out of pocket medical expenses for all elderly or disabled household members.

CUIDADO COMPLETO DE SALUD SIN COSTO

Louisiana Children’s Health Insurance Program (LaCHIP): Usted puede calificar
para LaCHIP si gana menos de los siguientes ingresos cada semana o cada mes:

<table>
<thead>
<tr>
<th>Tamaño de la Familia</th>
<th>Ingreso Semanal ($)</th>
<th>Ingreso Mensual ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>426</td>
<td>1,702</td>
</tr>
<tr>
<td>2</td>
<td>571</td>
<td>2,282</td>
</tr>
<tr>
<td>3</td>
<td>716</td>
<td>2,862</td>
</tr>
<tr>
<td>4</td>
<td>861</td>
<td>3,442</td>
</tr>
<tr>
<td>5</td>
<td>1,006</td>
<td>4,022</td>
</tr>
<tr>
<td>6</td>
<td>1,151</td>
<td>4,602</td>
</tr>
<tr>
<td>7</td>
<td>1,296</td>
<td>5,182</td>
</tr>
<tr>
<td>8</td>
<td>1,441</td>
<td>5,762</td>
</tr>
<tr>
<td>De 8 y más</td>
<td>Para cada miembro más, añade $580 al ingreso mensual de una familia de 8</td>
<td></td>
</tr>
</tbody>
</table>

Si su ingreso es más de los que están escritos aquí, los niños todavía pueden calificar. Usted puede recibir más deducciones por los gastos del cuidado de los niños, manutención recibida y más.

**Documentos requeridos:** Para cada solicitante (niño/a) tiene que traer: tarjeta seguro social, actas de nacimiento, comprobantes del ingreso total, comprobantes de los gastos del cuidado de los niños o adultos incapacitados, prueba de la fecha del parto para las quienes están embarazadas, tarjetas de seguro de salud o carta de beneficios de salud.

¡Más comida para usted y su familia!!

**Programa de Estampillas de Comida:** Si su familia no gana más de los siguientes ingresos cada mes, usted puede calificar para las estampillas de comida:

<table>
<thead>
<tr>
<th>Tamaño de la Familia</th>
<th>Ingreso mensual bruto ($)</th>
<th>Ingreso bruto de la familia donde los ancianos listados ganan un ingreso aparte de con quien están viviendo ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1,062</td>
<td>1,348</td>
</tr>
<tr>
<td>2</td>
<td>1,430</td>
<td>1,815</td>
</tr>
<tr>
<td>3</td>
<td>1,799</td>
<td>2,283</td>
</tr>
<tr>
<td>4</td>
<td>2,167</td>
<td>2,750</td>
</tr>
<tr>
<td>5</td>
<td>2,535</td>
<td>3,218</td>
</tr>
<tr>
<td>6</td>
<td>2,904</td>
<td>3,685</td>
</tr>
<tr>
<td>7</td>
<td>3,272</td>
<td>4,153</td>
</tr>
<tr>
<td>8</td>
<td>3,640</td>
<td>4,620</td>
</tr>
<tr>
<td>Cada miembro adicional hay que añadir</td>
<td>+369</td>
<td>+468</td>
</tr>
<tr>
<td><strong>Limite de recursos personales (cuenta de ahorros/dinero en efectivo)</strong></td>
<td>2,000</td>
<td>3,000</td>
</tr>
</tbody>
</table>

**Documentos requeridos:** Tarjetas de seguro social, verificación de identidad del cabeza de familia, comprobantes de sueldo, verificación de la hipoteca, renta, utilidades, cuentas de ahorros o corrientes, pruebas de los gastos del cuidado de los niños, becas, donaciones, préstamos estudiantiles, facturas medicas de los ancianos o personas deshabilitadas de la casa.
Food Stamp Myths and Facts

Myth: There is no way I will qualify for food stamps.
Fact: You might be eligible for food stamps even though you:
  • Work Full-Time
  • Own A Car

Food stamps are based on the amount of money you earn, the number of people in your family, and some of your monthly expenses. Food stamps work for working families!

Myth: If I apply for food stamps, I have to go to the welfare office and wait in line with lots of people. I do not want anyone to know that I use food stamps.
Fact: No one else needs to know! Call PathWaysPA for a confidential screening. You can find out if you’re eligible and get information on how to apply right over the phone!

Once you have food stamps, you can swipe a food stamp debit card at the grocery store as if you were using a credit card!
Find out if you or someone you know is eligible for food stamps!
Every little bit helps!

Call PathWaysPA: 610-543-5022

Food Stamps Make America Grow Stronger

This project has been funded at least in part with Federal funds from the U.S. Department of Agriculture. The contents of this publication do not necessarily reflect the view or policies of the U.S. Department of Agriculture, nor does mention of trade names, commercial products, or organizations imply endorsement by the U.S. Government. The USDA is an equal opportunity provider and employer.
Food Stamp Myths and Facts

Myth: There is no way I will qualify for food stamps.

Fact: You might be eligible for food stamps even though you:

- own a car
- work
- are single

Food stamps are based on the amount of money you earn, the number of people in your family, and some of your monthly expenses. Food stamps work for working families.

PathWays PA
services and advocacy for women, children and families

Want help applying for food stamps?

Call PathWaysPA at 610-543-5022

Food Stamps Make America Stronger.

This project has been funded at least in part with Federal funds from the U.S. Department of Agriculture. The contents of this publication do not necessarily reflect the view or policies of the U.S. Department of Agriculture, nor does mention of trade names, commercial products, or organizations imply endorsement by the U.S. Government. The USDA is an equal opportunity provider and employer.
Food Stamp Myths and Facts

**Myth:** If I apply for food stamps, I have to wait in line with lots of people. I do not want anyone to know that I use food stamps.

**Fact:** No one else needs to know.
You can apply for food stamps online at home or at the library. In person at a PathWaysPA outreach site. Once you have food stamps, you can swipe a food stamp debit card at the grocery store as if you were using a credit card.

Want help applying for food stamps?

**Call PathWaysPA at** 610-543-5022

Food Stamps Make America Stronger.
Food Stamp Myths and Facts

Myth: If I apply for food stamps, DPW will put a lien on my house.
Fact: Food stamps are available to families to make ends meet. If you qualify for food stamps, you can receive them free of charge. You do not need to pay them back.

Myth: Why should I bother with food stamps? My benefits will be too low to help my family.
Fact: Food stamp benefits can be as high as $408 per month for a family of three. But even if you get the minimum benefit, it will really add up over a few trips to the supermarket. Every little bit helps.

PathWays PA
services and advocacy for women, children and families

Want help applying for food stamps?
Call PathWaysPA at 610-543-5022

Food Stamps Make America Stronger.

This project has been funded at least in part with Federal funds from the U.S. Department of Agriculture. The contents of this publication do not necessarily reflect the view or policies of the U.S. Department of Agriculture, nor does mention of trade names, commercial products, or organizations imply endorsement by the U.S. Government. The USDA is an equal opportunity provider and employer.