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FAMILY STABILITY CHALLENGE

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The Family Stability Challenge sets out to improve the economic position of Philadelphians experiencing poverty by making sure they are accessing all of the benefits and income supports for which they are eligible. This multi-year investment is focused on:

- Reaching those who haven't been reached, but are eligible for benefits and services
- Providing services that stabilize families
- Investing in collaboration and referrals across organizations
- Improving data-sharing infrastructure and capacity

Each of the coalitions supported by this Challenge is composed of trusted community-based organizations that are well-positioned to significantly increase enrollment rates in a wide range of social safety net benefits and services, including both emergency and long-term supports. You can read more about the approach and the investments made to date in the **2021 Fall Report**.

Four coalitions are engaged in the Family Stability Challenge:

The Collaborative to Advance Stability connects community-based groups in North Philadelphia and across the city to increase access to critical services including free tax preparation, benefits enrollment, financial counseling, and legal services.

The Latino Equitable Development Collective is a collaborative effort of six Latino serving and led groups that builds on existing data-driven initiatives to reduce poverty in East North Philadelphia.

No One Left Behind combines the efforts of three organizations to reach underserved immigrant and low-income populations across Philadelphia.

The South Broad Partnership supports and connects South Philadelphia residents to housing counseling, economic empowerment programs, and an array of benefits to build economic stability.

As we continue to develop a culture of learning, we are dedicated to fostering transparency with our funders, The Promise Governance Board, our grant partners, and the broader anti-poverty ecosystem in Philadelphia. We are committed to sharing our emerging lessons so we all deepen our understanding of what it will take to improve economic security of the community members in our region. We want to provide our stakeholders a "look under the hood" as we share what we are learning, and how our insights are informing our work and the work of our community partners.

Our lessons align with seven themes:

- **Collaboration:** While not new to community-based organizations, collaboration still requires time to build relationships and establish trust. This work is a precursor to collaborating effectively.
- **Capacity Building**: Supporting a new, community-based initiative with a focus on learning required new muscles and embracing emergent strategies based on the needs of the community-based organizations.
- **Data Collection and Sharing:** Sharing data across organizations that are mandated to protect personally identifiable information (PII) is a formidable challenge, and one that impacts the efficacy of inter-agency referrals as well as coalition-level progress monitoring.
- **Marketing and Outreach:** Marketing and outreach to community members may be the single most important factor driving awareness and uptake of social safety net benefits. Financial support and technical assistance from The Promise have assisted in deepening this capacity.
- **Personalized Support is Critical for Client Success:** A significant level of engagement may be required to get some clients from intake through the entire process required to secure benefits, particularly if multiple benefits are involved.
- **Context Matters:** Trends in service delivery data during the first year of the Family Stability Challenge cannot be properly understood without considering the variety of factors impacting service delivery and uptake
- **The Value of Life Changing Benefits:** FSC coalitions have secured important benefits for community members, and in many cases the value of those benefits received by an individual or family has been life-changing.

Summary of Emerging Lessons

Collaboration

While not new to community-based organizations, collaboration still requires time to build relationships and establish trust. This work is a precursor to collaborating effectively.

> “Effective collaboration is one that utilizes the strengths, vision, and creativity of all partners to garner results that exceed what any one partner would have been able to accomplish singularly successfully. Any joint venture is initially approached with caution, but as trust is built, the collaborative relationship strengthens. [Our coalition] has grown in this way. Because of the coalition, we have more referrals between our organizations. It is beneficial that the organizations in our partnership (although offering some overlapping services) offer different services that allow our collaboration to offer more comprehensive assistance to our community.”
>
> *- FSC Community Partner*

Some of the coalitions with a history of working closely together were able to quickly organize themselves into a formal partnership arrangement. Others, who had never formally collaborated prior to this initiative, needed to get to know each other and develop the level of trust required to plan, problem-solve, and innovate together. The participating organizations devoted themselves to developing and nurturing these relationships, reflecting an investment of what is often a community-based organization's most precious resource: time.

We have also noted that the burden of collaboration is not always evenly distributed. Our hope was to create teams of equals, but the truth is that the lead organizations bear the responsibility of reporting and complying with contractual agreements with The Promise, which often puts them in the uncomfortable position of being seen as the organization 'in charge' of the coalition. We seek to learn more about that dynamic in Year Two as we work with coalitions to deepen coordination, communication, and engagement in each of the coalitions.

Capacity Building

Supporting a new, community-based initiative with a focus on learning required new muscles and embracing emergent strategies based on the needs of the community-based organizations.

> "By being part of The Promise, we are "in the loop" we receive a lot of guidance; we learned a lot from the convenings, and we use this daily in our work..."
>
> *- FSC Community Partner*

The Promise always had a vision of moving away from using data for accountability and toward the use of data for learning and continuous improvement. This required a shift in the traditional funder-grantee relationship that took some months for everyone involved to become accustomed to. We sought to create the conditions for the organizations to learn from their work and the work of their partners by creating reporting structures that were designed to facilitate reflection, rather than the traditional focus on accountability. This was no small feat given the perception of pressure to demonstrate high performance in the early months of the work. We are still learning about how to best support the partners in their journey and will continue to solicit feedback in formal and informal ways along the way.

In addition to changing the focus of reporting from accountability to learning, we built a number of processes, systems, and supports to provide ongoing assistance where we were able to do so. Each coalition meets with The Promise team every other week to hear and share updates, surface challenges and opportunities, and troubleshoot as needed. By staying in a close community with our partners, we were able to advocate for necessary resources to improve the experience of the partners, and therefore, the community members they serve. In February 2022, we extended one of the bi-monthly sessions to 90 minutes for an in-depth review of data on service provision in the first two reporting periods, and to create space for collective sensemaking about the trends, contextual factors that support or constrain their work, ongoing data needs, and ideas for program improvement.

In addition to the regular meetings with each individual coalition, the full group of 24 participating organizations was brought together from September 2021 to March 2022 for two-hour virtual convenings on three occasions. These convenings were designed as peer-to-peer learning opportunities and focused on making connections across the coalitions, as well as providing space to engage subject matter experts on particular topics of interest, such as sharing early learnings, resolving data collection challenges, and exploring strategies to improve marketing and outreach. We continue to solicit our next topics of focus from the community partners and plan on continuing to engage in 2-hour convenings every other month for the length of The Promise.

We also created a monthly newsletter to support the development of a shared identity among The Promise grantees and ensure the partners were updated on the broader efforts related to The Promise. Outside of the formal structures for information sharing that were put in place, our team has provided coaching, outreach to City agencies, and other support to the coalitions as needed. We were able to build some key bridges to staff in key city agencies and with other actors in the benefits access landscape as a result of these conversations.

Data Collection and Sharing

Sharing data across organizations that are mandated to protect personally identifiable information is a formidable challenge and one that impacts the efficacy of inter-agency referrals as well as coalition-level progress monitoring.

> "The quantity of data can be difficult to compile each month because larger organizations use different data systems to store data for different programs within their agency, such as different systems for clients receiving tax services and housing services."
>
> *- FSC Community Partner*

Data analysis is an important aspect of the Family Stability Challenge because we hope to quickly learn about strategies or innovations that are working to reach previously underserved populations and share insights about effective practice within the group of coalitions and more broadly with stakeholders in the City. Real-time data analysis is also a key to understanding how well the inter-agency referral processes in the coalitions are working, and to identify what if any tactical modifications are called for. Given the centrality of data to this work, a significant investment in technical assistance was made at the outset of the Challenge. We knew that each organization came to this work with strong data systems in place because they are the city's strongest providers of social safety net services. What we did not know at the outset was how diverse the data management systems would be across the participating organizations. Our initial inventory of data management systems revealed that the organizations that comprise the four coalitions use at least 13 different data systems. Understanding that it would be burdensome to the organizations to impose yet another system solely for the purpose of tracking FSC-related service provision, we opted to create a solution that would allow the coalitions to work with an existing system and export quarterly reports to The Promise team.

Over the first three quarters of the Challenge a number of observations about data management emerged primarily related to data sharing and inter-agency referrals. Most important among the challenges are the constraints that each organization must navigate to protect personally identifiable information for each of its clients. The coalitions have a goal that they will share information with their coalition partners as part of a "warm handoff" from one agency to the next when a client is found to be eligible for services or benefits that an organization offers.

It goes without saying that the capacity to share data is critical to the Family Stability Challenge model: member organizations must refer clients from one organization to the next because they each have unique areas of expertise. For example, some partners focus on tax preparation and are experts in identifying tax credits, while others address housing supports and understand the menu of available programs, eligibility requirements, and application processes. Data sharing is the key component to seamless referrals and the ability of the organization that does intake for a community member to conduct follow-up throughout the many stages of the application process.

We also learned that coalitions have found it challenging to develop a consistent reporting system across their organizations because of the wide range of benefits and services they provide. The rapid ramp-up of service delivery did not provide adequate time to develop a deep understanding of services beyond their sphere of expertise and to develop a shared vocabulary about how those services would be tracked in a coalition-level database.

As we look ahead to the second year of work, one of our highest priorities is to reimagine the data system used to track clients and services, starting with the development of a common data dictionary that each coalition will use in reporting. We are also working to implement an improved data collection system so that we might capture additional data that the coalitions have requested and that we believe will enrich our understanding of the bright spots and ongoing challenges related to expanding the range of benefits obtained by the clients served.

Marketing and Outreach

Marketing and outreach to community members may be the single most important factor driving awareness and uptake of social safety net benefits. Financial support and technical assistance from The Promise have assisted in deepening this capacity.

> “The outreach efforts of [our organization and our partners] have been instrumental in reaching individuals and families who possibly will benefit from the services and which are available, especially for them. The success of the program is represented by families who indicate that they would not have received the benefits if outreach was not conducted by [our coalition].”
>
> *- FSC Community Partner*

Each coalition budgeted funds for improving or creating marketing and outreach strategies designed to target specific neighborhoods or populations within the City. Grantee organizations used a wide variety of outreach and marketing tactics, including door-to-door canvassing, distribution and/or posting of fliers in targeted communities, advertising in public agencies and on public transportation, and extensive social media marketing. We learned in conversations with the coalitions that these methods, along with old-fashioned word-of-mouth referrals made by satisfied clients, seem to have worked. While no data was systematically collected to determine which approaches were most effective, the member organizations shared compelling anecdotal evidence that they were successfully raising awareness about their work and driving new clients to their agencies. In Year Two we hope to modify our data collection approaches so that we are better able to determine which marketing and outreach strategies are most effective in particular communities or for particular types of benefits.

Personalized Support is Critical for Client Success

A significant level of engagement may be required to get some clients from intake through the entire process required to secure benefits, particularly if multiple benefits are involved.

> "Mr. H came to [our agency] to apply for Food Stamp (SNAP) benefits. Our counselor assisted him to fill out the documents he needed and complete the SNAP application on the COMPASS website. Our counselor also screened his eligibility for other programs and described the programs to him. Mr. H might be eligible for LIHEAP, PWD TAP, and senior tax freeze programs... During [a subsequent] session, the counselor followed up with the client and was thrilled to know that his SNAP application was approved for $393 monthly. Now Mr. H and his wife can save $4,716 annually for grocery expenses... The LIHEAP, PWD, and TAP applications were also submitted during this session.... **[Our team] had 14 interactions to assist Mr. H to apply for these programs to lower his household expenses so he can save and be financially stable.** A lot of the time was spent assisting clients in gathering the appropriate documentation and follow-up. But with the client's cooperation and patience, we both can accomplish the goals."

There may be a perception that "one-stop" benefits screening streamlines the process of applying for multiple benefits or simplifies the administrative process, but we have observed that is not always the case. We have learned that community organization staff are frequently required to spend hours on one client's application, which may involve many follow-up calls with agencies to ascertain the status of an application or to work with a client to secure all required documentation. When this is taken into account, the service numbers that the coalitions have produced in under a year seem far more impressive than they may appear to be on the surface, reflecting many hours of investment for each bundle of benefits secured.

Context Matters

Trends in service delivery data during the first year of the Family Stability Challenge cannot be properly understood without considering the variety of factors impacting service delivery and uptake.

> "Initially, in December, [our organization] was planning for in-person tax filing sites but due to the resurgence of COVID-19 and its ongoing iterations, we had to pivot to provide drop-off sites and virtual tax preparation instead with phone follow-up. Having drop-off sites means fewer individuals are engaged on-site which decreases the completion of referrals and can result in delays regarding benefits follow-up. This makes the collaborative network play an even more important role by implementing a strong referral pathway off-site that hadn't existed as extensively in the past, but COVID-19 still represents the greatest challenge to our mission."
>
> *- FSC Community Partner*

The Family Stability Challenge ramped up rapidly during a COVID surge in the Summer of 2021. This was a period of tremendous need and tremendous opportunity: economic hardships resulting from the pandemic heightened demand for emergency food, housing, and income support. At the same time new federal policies, such as the expanded Child Tax Credit, and local policies, like the rental and mortgage assistance programs, created an opportunity to extend a financial lifeline to thousands of families - if they could be supported to file their taxes before the July 2021 deadline. The launch or sunsetting of federal and local policies and programs also impacted the trend in benefits applications. In August 2021, the federally-mandated eviction moratorium expired, creating an increased demand for rental assistance. On the flip-side, utility companies were prohibited from shutting off heat during the peak winter season, which may explain fewer than expected requests for the LIHEAP program during the winter months.

The Value of Life-Changing Benefits

FSC coalitions have secured important benefits for community members, and in many cases, the value of those benefits received by an individual or family has been life-changing.

> “Ms. A is a 45-year-old woman who was struggling to get by even before the pandemic fueled economic slowdown. She was working four low-wage jobs, patching together income, to support herself before she lost them all in the pandemic. She tried to apply for the new Pandemic Unemployment Assistance (PUA) program but faced bureaucratic obstacles in navigating the online portal to access benefits. After months of trying on her own with no results, [our agency] was able to help her claim the additional unemployment benefits. [Our] persistent advocacy on behalf of Ms. A with the Department of Labor finally moved her claim forward and she received $11,745 in unemployment benefits to help put her on the path to economic stability.”

One of the delights in this work is the payoff: people in need are receiving the help they so desperately require. During this first year of implementation, we have heard several accounts of these types of wins, and when we consider that thousands of individuals and families have been served, we are hopeful that this work will indeed live up to its promise to Philadelphia.

> “Mr. K is homeless and living in the backroom of a Woodland Avenue business. He was referred to Southwest CDC because he didn't have an ID and needed money to get a duplicate driver's license. We gave him the $32.50 he needed for PennDOT, and he received his license. Mr. K had not received any stimulus money in 2020 or 2021 because he had not filed his taxes. So Southwest CDC referred Mr. K to the African Culture Alliance of North America (aka ACANA) to get his taxes done. After he filed his taxes, ACANA told Mr. K that he would be receiving almost $4,000 in stimulus funds. The stimulus refund will help him get back on his feet. Southwest CDC is also giving him a place to sleep while they help remove other barriers to Mr. K achieving financial wellness.”
>
> - *FSC Community Partner*

Mr. K's story is an enlightening one: it is hard to imagine that only $32.50 stood in the way of him getting access to $4,000. But that is what our partners do. They walk alongside people and make sure they have access to everything available to them to help fit their immediate, and eventually, long-term financial needs. Our community partners are working with individuals and families as they navigate antiquated, bureaucratic systems to ensure that they make it through the application phase. The hands-on work that our partners do is often overlooked when we think about what it takes to ensure equitable and inclusive delivery of social safety net programs and services.

Looking Ahead

In Year Two, we will continue to support the coalitions in streamlining, strengthening, and formalizing the approach to marketing and outreach, the systems that support inter-agency referral, and the practices that help them operate as partners more effectively. The coalitions have made great progress, but there is further to go.

We plan to continue to listen and learn from them, and to share those lessons with the broader community of actors interested in expanding economic security in Philadelphia.

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