



## Audio Conference: Braiding Funding Streams to Support Integrated Service Delivery

March 29, 2011

OPERATOR: Abby, the floor is yours.

ABIGAIL NEWCOMER, INCOME AND WORK SUPPORTS POLICY ANALYST, CLASP: Thank you so much. Well, welcome everyone to the call, Braiding Funding Streams to Support Integrated Service Delivery. It looks like we have a good group of listeners on the line, so we'll get started.

This audio call is meant to provide you with an orientation to the [integrated service delivery toolkit](#) that CLASP recently released, with support from the Annie E. Casey Foundation, and to provide examples of organizations that are braiding and – public and private funding sources together to administer integrated services. This is Abby Newcomer from CLASP, speaking. And with me today I'm joined by Susan Gewirtz, Senior Associate for the Center for Family Economic Success at the Annie E. Casey Foundation; Donna Taglianetti, Executive Director of Co-Opportunity in Hartford, Connecticut; and Yesenia Cervantes, Director of the Center for Working Families at Instituto del Progreso Latino in Chicago, Illinois.

So before we get started, I wanted to give you a sense of the format of the call. We will hear from Susan Gewirtz shortly. Second, I will provide an introduction to the integrated service delivery concept, and then to the toolkit itself. Thirdly, we'll do a conversation, a question-and-answer with Yesenia and Donna about their work to bundle public and private funding sources to support their programs. And lastly, we'll take questions from you. And so this is going to be my first of many reminders to please e-mail your questions to [audioconference@clasp.org](mailto:audioconference@clasp.org). You can do that starting now and we will look forward to seeing your questions.

So first things first, it is my pleasure to introduce Susan Gewirtz. Susan has been the primary manager and the champion of the Center for Working Families approach as it began and has expanded over the last few years. As such, she has been a strong advocate and supporter of the integrated service delivery approach. We're pleased to have her on the call today. Susan?

SUSAN GEWIRTZ, SENIOR ASSOCIATE, CENTER FOR FAMILY ECONOMIC SUCCESS, ANNIE E. CASEY FOUNDATION: OK, thank you, Abby. I'm pleased to be here, hello, everybody. I'm Susan Gewirtz with the Annie E. Casey Foundation.

I'm really pleased that so many of you are interested in integrated funding streams, and are able to participate today. The Casey Foundation was one of the first investors in this integrated service delivery approach through our Center for Working Families effort. In 2005, investing in approaches integrated workforce, asset building and work supports was relatively new, and for Casey, grew out of our recognition that these three strands of work, when bundled together, have the potential to increase the impact of each service, and provide families with the tools to build a stronger financial future.

The work of integrated service delivery is about how to align the work in these three areas, is about leverage and coordination, and maximizing the potential of a bundled services approach to benefit low income families. By 2010, integrated service delivery strategies had begun to show promising results. With a recent study by Abt Associates it is suggesting that families who receive these three services, these three types of services bundled together, were three to four times more likely to achieve important economic outcomes.

And a number of national leaders have emerged, including the Local Initiative Support Corporation, LISC, United Way of America, community colleges in partnership with MDC, Bank of America and other national foundations, all of whom are supporting integrated service delivery approaches. Today, there are dozens of programs in over 20 cities that have incorporated the approach. It's a really exciting time for this work right now.

Supporting integrated service delivery programs and bringing them to scale so that they can have greater impact for low income families will require greater use of federal funding streams. To date, it has been difficult for many programs to understand how to make funding streams work together to provide greater and more effective support to families.

So as a result, Casey asked CLASP last year to examine some of the most relevant federal funding streams, and do some research for us on how some programs have been able to use them creatively towards providing integrated service delivery programming.

The toolkit that you're about to learn more about today has some of the most relevant federal funding streams, and offers important insight in how those funds might most effectively be used in support of the approach. And I'm really excited that we have practitioners on the call who will describe how they've successfully utilized federal funding in their programs, and they're going to speak to the challenges and value added. So thanks again for joining the call, thank you to CLASP for doing the work and organizing it.

So with that, I'll turn the call over to Abby from CLASP. Thank you.

NEWCOMER: Great, thanks so much, Susan. And thanks for your support during this whole process.

So I wanted to give you about five minutes of background on the approach before we get started with talking about the toolkit itself. So first, what is integrated service delivery? I want to start with the Center for Working Families concept, which was the first integrated approach developed by the Casey Foundation, as you've just heard, to address the problems that low income families face. These families must navigate a fragmented system to obtain critically needed work supporting services and benefits.

And I think a good analogy when you're thinking about the reasons why you want to provide integrated service delivery is that imagine if you wanted to buy a car. Instead of going out to a dealership and buying the whole car, you had to go from store to store to purchase each part and put it together. So you actually as a result may end up with a running car, or as we see, many people won't. They would have some engine, some steering wheels, but not necessarily an end product that they can drive and move forward.

This also doesn't make sense from an efficiency standpoint when it comes to service delivery. We think that workforce services, income and work supports, and financial services, which all help low income working families make ends meet, and help them plan for the future should be delivered together in an integrated manner.

The Center for Working Families concept, and now the integrated service delivery approach as we'll call it, offer a framework for delivering key services and financial supports to low income workers and students. They have the goal of fostering new economic opportunities.

And, as we said, they do so with three main components of the approach, and those are employment and career advancement services, income enhancements and work supports, and financial services, which includes financial literacy and asset building services.

The key to the approach is integration. These programs are more than the sum of their parts. The goal is to make every piece of the model and the service delivery of that piece seamless from the perspective of the client, even though funding may be siloed. We want him or her to be able to gain access to a group of or all of the services in the approach with no confusion.

Integrated service delivery centers are one stop shops that help people both meet their immediate needs, as well to come up with plans that will move them towards longer-term financial success.

They're housed in many types of organizations: community based organizations, community colleges, government offices or agencies, community health centers and K- 12 schools. And as you'll see from our practitioners, in practice, integrated service delivery programs will look different depending on the types of organizations that house them. If, for example, a program is housed at a community college, the focus will be on student retention, and will build on the other supports that exist in a community college setting. This program might look really different from one that is housed in an elementary school, or one that's housed in a nonprofit organization with a particular focus.

These programs require significant resources, and work best when they are well integrated into the current work of the host organization; when they tap into multiple funding sources and braid those sources together; and when they establish strong partnerships between organizations.

As Susan mentioned, a number of private funders have made significant investments in the integrated service delivery concept. However, they recognize the need to access public fund in order to bring this approach to scale. Thus, the goal of our project here, and the one we'll be talking about, was to identify and profile a set of public funding sources that could sometimes theoretically and sometimes actually be used to support integrated services.

And so with that, I want to jump into the toolkit and give you an orientation to the resource. Again, we focused on the three main components of integrated service delivery: employment and career advancement, income enhancements and work support, and financial literacy and asset building.

The focus of the toolkit was threefold: one was to find programs that support components of the model. Two was to identify eligible populations and current permissible and common uses of these public funds, and third was to identify common issues or challenges that could arise.

In all, we identified 16 programs. These represent a range of different types of programs. Some are specifically aimed at one activity, these tend to be great for that one activity, whether it be asset building, free tax assistance, or workforce training, but they are more difficult to use, or impossible to use for other parts of the integrated service delivery approach.

Other types of public funding sources are more flexible, and these are typically block grants. If you think about Temporary Assistance for Needy Families, or the Community Development Block Grant, those are the programs I'm talking about.

And these ones can typically support all of the elements of the integrated approach, but because they're flexible, there are many demands on them, and they're not funded at a level that would allow us to provide comprehensive services to everyone who needs them.

In this project, we didn't attempt to be comprehensive, we attempted to identify the largest funding sources and the ones that were most appropriate for the kinds of work that the integrated service delivery approach attempts to do. So, we didn't discuss programs that are narrowly targeted to a specific population, for example, ex-offenders or Native Americans.

It is important to note that many of these programs do not, in practice, currently fund programs that provide integrated services, and most are not funded at levels that would allow them to meet all of the needs of the people who qualify for services. Further, even though we came up with 16 programs, these are not duplicative programs. As I said, but it's worth saying again, few, if any, of these sources could fund the whole model in total.

You'll hear that from our speakers, again, as we move on, and have more of a conversation because they've accessed some of them, and have figured out which ones are appropriate for their specific organizations and their specific target population. Again, the goal is to braid funding sources together, so that participants will have a seamless experience.

So how should you use the toolkit to inform yourself about these programs? I'm going to go through some of the sections of the different briefs that are included within the toolkit, just to give you a bit more of a detailed orientation of what you can expect when you look through it closely.

Each brief has a chart at the beginning that gives you a snapshot of the programs and services that the program could fund according to statute and regulations. That'll be useful just to sort of flip through and try to see if this one is going to be able to fund workforce services, is it going to be able to fund asset building services, et cetera.

Each provides state examples to show how programs are using the source of funding throughout the country, and the briefs are also broken up into sections meant to answer some of the main questions you might have about them. The first is eligibility and targeting, which sets out to answer questions like what entity or entities received these funds? Or who is the program meant to serve?

There's a section on services and program support, which talks about what the program funds are allowed to be used for, whether they're required activities, or permissible activities, and how much flexibility there is in the source.

There's also a section on non-federal funds. Lots of these grants have significant matching or maintenance of effort requirements. Some of them have designated grantees, or grantees that have historically received funds over time. This section discusses these requirements, and also these trends.

There's a section on program limitations, and this is listed to give us a sense of what applicants for funding can expect to experience when they apply. Are there shortcomings in the program, or specific pieces in the program that will make it more difficult to administer, or more difficult to secure? These are important pieces when you're considering applying for funding.

And lastly, there is a short section at the end that also gives a snapshot on state allocations and contacts, and these are resources and websites to be able to give you a next step, and provide more information.

In sum, this guide is meant to be a starting point, to spur ideas that could lead to better communication between practitioners and government stakeholders, and potentially open doors for funding relationships.

And with that, I want to engage Donna Taglianetti and Yesenia Cervantes in the conversation. They both administer integrated service delivery programs. Donna's organization Co-Opportunity in Hartford is the lead organization and host organization for the Hartford Financial Resource Center. And Yesenia heads two Center for Working Families sites for Instituto del Progreso Latino. These centers serve the Pilsen, Back of the Yards, and Little Village neighborhoods in Chicago.

I'd like to start by having each of you tell us about your program, and how it compares to the theoretical model that I described just a couple of minutes ago. Why don't we start with Donna?

**DONNA TAGLIANETTI, EXECUTIVE DIRECTOR, CO-OPPORTUNITY:** OK, thank you. I'm Donna Taglianetti, and I'm the Executive Director of Co-Opportunity. I appreciate being asked to talk with you today.

The Financial Resource Center that we developed in Hartford really owes its existence to the Casey Center for Working Family model. Hartford was a Making Connections site, and so we were heavily influenced by the work that was being done by the Center for Working Families, and in fact, all of the programming at Co-Opportunity and the Hartford asset building collaborative have been influenced by the work of Casey.

In addition, we have been lucky enough to have a local United Way, who's been a leader on the front of United Way's income goals. Nationally they've been a leader, and we've also been working with Bank of America in Hartford, and other financial institutions.

So I think that what we developed in Hartford was a working group that consisted of representatives from those organizations, and we had been running a very successful VITA EITC outreach campaign, and our goal has always been to take the success of that campaign and build out from there to figure out how we can use that experience to help our VITA filers become more financially stable.

We believed that the VITA sites that we had developed had become really trusted providers in the neighborhoods, and that all of the operators of those sites were not only providing VITA services, but were providing employment, other asset building services, financial services, educational services, and that we could package those in a way that would create this one stop center for people who were struggling financially. And our focus has been primarily on low and moderate income working families. And in essence, the model that's been described is exactly what we do, we focus on education, and workforce development, income enhancements and work supports, and financial services.

Co-Opportunity leads the effort, but we have a variety of partners who come in. Co-Opportunity is the main provider of financial services. And the other services are provided by partners who we either recruited, or who were existing partners of, for example, United Way, and were brought to the table by them to talk about developing the center.

The center is housed at Co-Opportunity, it has a core staff of five at this point. And then it's supplemented by partner agencies who out station their staff in the center either weekly or several times a month. Last year, the center served about 400 people, and that's in a variety of ways, but we are tracking sort of overall progress towards financial stability.

I'll wait to get into the variety of funding that we use, and I think that's a good overview of our center.

NEWCOMER: Great, thanks so much, Donna. And Yesenia?

YESENIA CERVANTES, DIRECTOR, CENTER FOR WORKING FAMILIES AT INSTITUTO DEL PROGRESO LATINO: Yes, good afternoon, everybody, and thank you for having me participate on this call.

My name is Yesenia Cervantes, and I work for Institute for Latino Progress, a not-for-profit organization in Chicago. The department that I oversee is the Center for Working Families, as I mentioned, which is pretty much a comprehensive partnership between Instituto and the Resurrection Project. And basically our goal is to promote and support financial stability and economic success of Latinos and Latinas throughout the city of Chicago.

I want to mention that the Center for Working Families actually grew out of a \$50,000 grant that we had from the City of Chicago, the Chicago network system, which used to be a career center prior to 2005. We grew up

with a \$50,000 budget, now at \$1.2 million, and over \$200,000 of those \$1.2 million are still coming from the City of Chicago.

Our focus prior to the Center for Working Families, which also initiated with the work that we started doing with the Annie E. Casey Foundation, and thinking about the concept of integrating all the stuff that we were already doing in workforce and career development, and also in bridge programs. We've been doing workforce for the last 15 years, but as of 2005, we implemented and started working with Annie E. Casey Foundation, as well as with LISC [the Local Initiative Support Corporation] here in Chicago to become a Center for Working Families. Nowadays we service over 400 people in the three areas of services, workforce, and career advancement.

We do financial coaching. We also do public benefits, and just referring to the braiding of the different funding sources, my agency, or the Center for Working Families, just to give a broad overview, we're 15 percent private funding, and then the other 85 percent it's still public funding overall.

To deliver the services that we offer, we have several partners, and as I say, the first one, is the Resurrection Project, which we partnered to the financial coaching piece. We also have a strong relationship with the Center for Economic Progress, because we are also a VITA site. And for this, we service over 1,500 people on an annual basis, bringing returns of income to Chicago of over \$3 million.

We work with Mujeres Latinas en Acción – Latina Women in Action, also another not-for-profit organization in Chicago where we refer people that is going through some domestic violence. We work with Olivia Medical Center, and at Instituto we have another big department that we work very closely with, which is the manufacturing center. It's a hub of manufacturing jobs for the City of Chicago, and it's also administered by Instituto.

We work very closely with the city colleges, and among other employers, we have a strong relationship with the Metropolitan Chicago Healthcare Council, with LISC definitely through AmeriCorps, and also with the City of Chicago for several funding sources that we received from them to do workforce services.

And I will say that's pretty much the overview of Center for Working Families over here.

**NEWCOMER:** Great, thanks. And so I want to move into what funding streams you're accessing. If you could talk a little bit more, I know, Yesenia, you just mentioned a couple of them. But if both of you could talk about the ones that you have access to support integrated service delivery. And broadly, what share of your budget is accounted for through these streams?

**CERVANTES:** Right now, 85 percent of the budget that we have is basically public. One of our largest funder is the Workforce Investment Act. We also received funding from the city and the state to do workforce development programs, such as CDBG and the Donated Funds Initiative, Title XX. To do the income supports and public benefits, we have an alliance with the Illinois Coalition for Immigrants and Refugees, and we receive money from their SNAP, just a very small grant, but still it helps us out to support the income support, and also

some partnership with LISC AmeriCorps. And to provide financial coaching services, we have LISC funding basically that has been the only private funding that we have had to offer financial services overall.

NEWCOMER: OK, thanks. And, Donna?

TAGLIANETTI: Actually, our situation is probably a little different. First of all, the partner agencies that provide services at our financial resource center are not getting funding directly through us. So when I talk about the funding, I'm really talking about the core services that Co-Opportunity provides, and the sort of overall management of the center that is getting funded through these sources.

So there are nine different funding sources, about 60 percent of that is private funding through United Way. We have used Annie E. Casey monies, Making Connections monies, and then Bank of America and other financial institutions.

But we are supported by a host of other money. Partners, for example, are bringing WIA monies to the table, SNAP outreach monies to the table. So they have very specific focuses, and those are the kinds of funds that they're accessing. Other funds that are supporting us include, we are a HUD housing counseling agency, so that is significant in our service delivery. We have a project in which we're working with the homeless population in Hartford, so we've used HUD homeless monies, and IDA money, IRS VITA money, a whole host of other kinds of money.

One new funding source that we've been working with is the Social Security Administration, so that's going to be different for us.

NEWCOMER: Great. And when you say IDA money, I know Connecticut has periodically had state money that was devoted to IDAs. Is that what you're referring to, or do you mean the Assets for Independence Act?

TAGLIANETTI: It's both, it's actually...

NEWCOMER: OK.

TAGLIANETTI: ...both federal and state. That is the only state money that we have for the Center.

NEWCOMER: OK, great, thanks. So as we did this project, we did not find a lot of organizations that were using multiple funding streams. And I'm curious if you can talk a little bit about what your secret is, and give up your secret, I guess. I'm curious whether it has to do with relationships, or your background and history receiving funding, or whether you have staff that's devoted to seeking out new sources, or if there are other things that have been the secret of your success in seeking out public funding streams. Why don't we start with Donna?

TAGLIANETTI: I don't think we have a secret, I think it's a little bit of many of the things that you've mentioned. We do have a full time staff person devoted to development to seeking out monies. I think a lot of

it has to do with the relationships that we've built, I think that the success of some of the other initiatives that we've had has spurred interest in investing in projects that we do.

But in fact, our relationship with United Way, for example, has in fact brought other people to the table. And I think that's been true of other funders as well.

But it's also about you know this is not the only service or the only project that Co-Opportunity has, and it's about rethinking the way the agency is organized, and trying to figure out how other programs that Co-Opportunity operates fit into that center. So while we run a housing counseling agency, and that housing counseling agency isn't imbedded in that center right now, our long-term goal is to make that happen. But right now, that center is providing service at the financial resource center.

So you know we've been able to really sort of integrate Co-Opportunity's funding streams to support this project.

CERVANTES: And I will say for me, I don't really know if there's a secret. I think that it's really important when I think about how is it that we've been able to sustain a Center for Working Families, especially that we're 85 percent public funding. I think that it took Instituto cultural change more than anything from the very beginning. Some of the funding sources that are part of the Center for Working Families have been going on at Instituto, we've been having them for a while. And I think that we were doing good work, we learned all of our benchmarks or contracts, and all of that stuff. And out of that, we also built a very strong relationships with our funders that we created an effective model. It took us a while and a whole transformation of the Center for Working Families from becoming the career centers, which were very funding driven, the whole staff of the career centers from management to intake, it was pretty much the structure of the culture, funding compliance with all the different funding sources that we had. We have Workforce Investment Act benchmarks, placements and all of those details.

So I think that one will be building up strong relationships, having an effective model of what you're doing. Except, for Instituto it took a cultural change in the mentality of the staff, instead of thinking about meeting the funding goals, we actually moved from the funding mentality to the community needs, really assisting the community, and working from that point of view.

So it's relationships, external with the funders, internal. I will say it has taken us also a lot of work to have a very strong relationship with our accounting department, also with the development department, so that at the same time that we're doing the programmatic delivery in a more integrated way, we're also having the same language with the finance department at the time of communicating to the funders so in the audit . And then at the time of applying or reapplying for the funding that we already have, it's having a strong relationship, in that we both speak the same language as the development person, so that at the time that we're applying for those specific outcomes or benefits that add funding, at the same time, we're talking about the bigger picture, and our need to support the community that comes in to the Center and needs more than a job, per say, or needs more than a food stamp application. I think that it has taken a strong internal relationship with our accounting and development departments, and then external relationships with our funders, and also making sure that, as I said, that we built on an effective model, so it works for the organization and for the community.

Also the relationships with the organization and the community have been key. We wouldn't be able to do the work that we do in an integrated way, the way that we're doing, if it wouldn't be for the relationships that we have with community organizations that support us in this integrated approach.

**NEWCOMER:** Great. And just a quick follow-up, Yesenia. I'm curious to hear just a little bit more about the role that LISC has played as an intermediary working with you and other Centers for Working Families in Chicago. Are you receiving technical assistance from LISC, or are they helping you gain access to funding and other resources? What role have they played in your organization and your Center for Working Families' development?

**CERVANTES:** Yes, LISC has been very key, and our relationship – as far as the integration of services, LISC has been extremely helpful for us as far as technical assistance, staff development. We hold quarterly meetings with LISC for directors. We also have peer gatherings with them. The financial coaches, the public benefits staff, the employment specialists, each of them. LISC hosts a meeting for each of those groups where they talk about their specific area of work, as well as the integration. LISC has been very key as far as also supporting us with AmeriCorps as well, because some of the positions are, especially the public benefits staff, we have one position that is AmeriCorps, and we've been able to get that through LISC.

Also when it came time to address the cultural change that I mentioned,, LISC has been very key. They sent us all to a training for career coaching and for financial coaching, which ended up being sort of the transition that we did from funding sources. It really supported that, the training the staff went on for career coaching and financial coaching. So LISC has been there offering technical support, training, as well as providing the database that we're now utilizing the ETO efforts to outcomes. We work very closely with them to develop the database from intake all the way to the managing of reports.

**NEWCOMER:** Great. And just to clarify for – we've gotten a question via e-mail - LISC is the Local Initiative Support Corporation, and LISC in Chicago works with the Center for Working Family sites throughout the city, and that's what Yesenia was just describing.

Donna, on the theme of partners, and you've talked about this a little bit already, but I want to just make sure that you didn't have anything else to contribute. Can you talk about how this set of partners that you work with to run the Financial Resource Center has impacted your efforts to seek out and secure public funding? Has it raised your visibility of the program? Has it allowed you to draw on connections with partners? Just broadly, how has it impacted your experience?

**TAGLIANETTI:** I would say that it has introduced us to new funders in some ways. We're not really a workforce agency, but it's allowed us to reach out to funders whose major focus in workforce, that we might not have received funding from in the past. But I also think that even more than that, the focus on collaboration in the project has been a tremendous benefit in securing funding. I think that that has been a feature of the project that has attracted attention, and quite honestly, those collaborations haven't always been smooth. They took a lot of work initially to figure out how we were going to manage them, and we probably did some things wrong at the front end.

But I think being able to stick with that, work through those kinds of issues, and to see that those partners today are still partnering with us, even though in many cases, their funding has been slashed or cut back as a result of funding cuts, and they may not be providing the same level of service. You know, somebody who was out stationing staff at our site two days a week may now be doing it one day a week, or once every two weeks. But the fact that they've still been there I think has helped us in terms of our ability to raise funds.

**NEWCOMER:** So one thing we heard from practitioners that we spoke with as we did this research is that meeting outcome and financial reporting requirements of some of these federal programs is challenging. And I know, Yesenia, you mentioned some of the database systems that you work on, and I assume keep up with some of these outcomes, and other reporting requirements in the databases. Can you talk about how you handle the challenge of keeping up on those kinds of requirements?

**CERVANTES:** Yes, I think that communication will be the number one way to overcome the challenges in the outcome and financial reporting. We have 13 different funding sources and, as I said, only one of them is actually private. What we decided to do with all the changes that we did in the agency in becoming the Center for Working Families is actually reestablish communications, so it is a communication system. It pushed the organization to have better communication with our funders, as well as with our partners.

For example, for all those different 13 funders that we have, we have quarterly meetings with them where we talk about outcomes and benchmarks and the finance status as well, the vouchering and stuff like that. Internally, we have monthly meetings with the accounting department just to make sure that we have expense reports up to date, and that we're allocating costs that they initially identify in the proposal or in the actual budget.

And then also with the staff, I meet with the staff on a weekly basis to talk about outcomes and benchmarks. So communication is really key in just trying to figure out and understanding the different promises that we do with the funders. It takes a while, it really takes a while, and it really – I will say it's hard work at the beginning, but once you become very familiarized with their benchmarks, their reporting, just calendar all of that in your agenda and make sure that there's good communication and understanding on the different financial issues, and then also on the outcomes with the funders. Also with management, it's really key. We also host meetings with upper management every other week, so there's a lot of meetings going on, but I think that it has been worthwhile. Communication is key, and just making sure that internally your organization, the different departments, yourself, the accounting department, as well as management is on the same page with the funders.

It could be a little hectic, but it works out having those meetings and communication, and being able to trickle that communication down to the staff, so that everybody's on the same page as far as outcomes.

**NEWCOMER:** And, Donna, how do you handle outcome and financial reporting requirements in your program?

**TAGLIANETTI:** Well, I think to some extent our financial reporting is more simple than what was just described, because our partners are primarily receiving funding not from us. So their funding requirements are I

guess their own headache. The outcome part of that has certainly been more complicated. I would say that, I wouldn't use the word challenging, necessarily, but I would use the words complicated and time consuming. I think similar to what was described, we have multiple requirements, we actually have multiple required databases and client tracking systems that are mandated by funders. And so that sometimes requires multiple data entry of the same client, and its different systems. And trying to really develop a workflow that minimizes those kinds of disruptions to staff that take staff away from providing direct client service has been a challenge, and not one that I think we have fully overcome. We're still working on that.

We decided a couple of years ago that one of the other challenges was that a lot of our funding is private, and in those cases, there isn't a required system to track client progress. But the challenge for us is implementing our own system when we have all these other required databases presents a whole different set of problems. Can we successfully integrate those databases? And the truth is, in some cases, they aren't going to get integrated because of the way in which federal agencies may develop and allow use of a database.

So in some cases, we're able to take data from one system and enter it and upload it into another. But in some cases, we're just not. So several years ago, we decided that because the Financial Resource Center really needed to rethink how it was tracking outcomes, we began using social solutions' Efforts to Outcomes and have spent last year really trying to integrate the other databases into that.

We're much more happy at this point with the system that we have in place to track outcomes, but it has definitely taken a while for us to get there. I'll also say that the benefit in some ways of mandated reporting systems is that in a lot of cases the data that they want you to track is clear and predefined. However, it doesn't typically end up being the data that the agency wants to track, and so we've gone through an internal process of identifying outcomes that as an agency we want to report on for participants in our programs, and then having to develop those kinds of systems that allow us to collect that data and be able to track it and report back, while at the same time making sure that we're collecting and tracking the data that our public funding sources want.

So you know it's more complicated than you'd like, but it's doable.

CERVANTES: Yes, I ...

NEWCOMER: Go ahead.

CERVANTES: I will say that, just as Donna mentioned, we also utilize ETO Efforts to Outcomes, and in addition to the different databases that we use for the different funders, the public funders that we have, we utilized Excel for some of the funders, we utilized Access for other funders. We utilized also other private owned databases that some funders have, and I would say also the beauty, or what has really worked out for Instituto is that initially it was seen as an additional database, the social solutions Efforts to Outcomes.

Throughout the years, we've been able to see the benefits of really utilizing it, and that's just for the fact that we were tracking all these other outcomes that all the funder wanted, but Instituto also wanted to track down some benefits and gains that we knew that they were taking place, like career advancement, people moving from one grade level to another grade level, that really none of the funders were currently capturing, or not requesting

information on. But our theme is, education is power, feel the power, so we have always been interested in capturing that. And I will say that it's still work in progress, but it's much better than five years ago when we started utilizing ETO.

So the benefit of actually having to use the ETO is that we are now able to create our own stories based on the stuff that we're also looking for as an organization to really talk about the success story of Instituto participants. Even though it's still challenging, I mean I could say that it's still a benefit, that at the end of the day, we're still doing double data entry. I wish we wouldn't, but we're able to save the stories, the success story of Instituto through this agency wide ETO database that we started doing five years ago.

NEWCOMER: Great.

TAGLIANETTI: And if I – just one quick ...

NEWCOMER: Sure.

TAGLIANETTI: ... to add is that you know the beauty of data is there's many important facets of data. One is to be able to tell a story about what you've accomplished, but the other is to use that data to better manage the programs that you operate, and the agency as a whole. And very frequently funder mandated data collection systems are really not about that second objective. And so ETO is much better because it's built by the agency, much more available as a management tool, and that's been a real plus for us.

NEWCOMER: Well, I want to turn the focus over to some of the questions that we've been getting via e-mail during the audio conference. And we've gotten a couple about – and I think particularly, Donna, we'd love your perspective on this, whether you could share any challenges or lessons learned about implementing a Center for Working Families, or integrated service delivery approach that braids funding sources with multiple agencies and organizations.

How do you mediate the challenges of all seeking out funding separately, of having to work together and make sure that you're not accessing each other's funds, et cetera?

TAGLIANETTI: Well, I'll start with the mistake we made up front, and I think that the partners that started with us are the ones whose funding is separate from the funding that we receive. We were all funded by our local United Way. But the United Way did separate contracts with each of us, and I think we all agree, including United Way, that that was probably a mistake, and it probably would have been better initially, things would have gone smoother, and probably developed more quickly had there been a lead that not only had operational responsibility, but funding responsibility.

But we've worked past that, and I think we've done that in a way that I've heard described before through making sure that we have written MOUs with all partners that clearly define roles and responsibilities, that address fundraising, and expect outcomes in reporting. And by then working with partners to make sure that we share a common vision, and frankly that's been difficult because of staff turnover, there's been a lot of staff turnover, not only of Co-Opportunity's staff, but of the partner agency's staff. In one case, the workforce

services were provided by the local one stop employment center, and our local workforce board changed program operators. So it was a completely different agency that came in.

So you know it's about communicating, holding regular meetings, orienting all of the staff, and having you know not only management staff, but line staff regularly meet and communicate about the participants that they're working with. So that's been a challenge, and it has taken a lot of effort. And there is still times where it's bumpy you know when we had this change in vendors of that project, we were sort of in limbo for a while not knowing what was going on. Hard to really get a lot of information, and you know so we were sort of holding our breath not really knowing what was going to happen next.

So you know it really has been a somewhat bumpy road at times, but it's been really about making sure that we communicate.

**NEWCOMER:** So with all of this that you've expressed a lot of the different challenges, but also the benefits of both working in partnership, of keeping track of lots and lots of databases, and outcomes and financial reporting requirements, of sort of the ways that you've braided funded sources together. And I'm wondering with both the challenges and the benefits if it's worthwhile for you to devote your staff resources and your time to seeking out public funding sources.

Either one of you can take that first.

**TAGLIANETTI:** Well, I can tell you that I think it's definitely worthwhile. I think – the fact is that our interest in doing this grew out of some of the challenges that we saw in the services we were delivering before we did this. So we had these sort of siloed programs that weren't very well integrated. We ran a housing counseling agency, for example. We had a large number of housing counseling clients who were 18 months away from being able to purchase a home, and trying to keep them engaged, and meeting with a counselor once every four to six weeks, it just really wasn't enough. And so these kinds of services that we've developed had helped round out what clients can be working on while they're preparing to move towards home ownership.

And so I think the client who comes through our doors gets a much fuller array of services, they're better served, but it's also about our ability to keep them engaged, and we don't want to provide a single service, we want to provide an array of services that help people move towards financial stability, and having those various options open for people does really work.

I also think just even having the workforce services, for example, we were seeing a lot of people who we could help them with all of the financial issues that they, but the bottom line was they needed more income. And so having those services, and we could make referrals and have always made referrals, but that's just not the same as having the service right in your facility, right there when the client is there. That makes a huge difference in whether or not the client actually follows through and takes advantage of those other services.

**CERVANTES:** And then my opinion, I will say definitely it is worthwhile. We've been making a big difference in the communities. Just as Donna mentioned, people who used to come into jobs, now we're seeing people actually not only looking for jobs, but really developing a career, and integrating into the mainstream.

These are difficult times, right, because of the recession. It's been wonderful that we have a Center for Working Families, and that we're taking a more integrated approach.

People who used to come in looking for a job, nowadays many of the times they come in because they're losing their houses, and if it wouldn't be because a couple of years ago we make that decision of integrating financial coaching into the workforce arena, which is our platform, many of those people wouldn't save their houses. Also many people wouldn't buy a house years ago when the economy was a little better. I will say this has also been very important, not only for the Center for Working Families and for the impact that we're having with our families, but also in terms of the relationships that we built with other organizations in the community. For example, with the Resurrection Project, nowadays we have many relationships at a different level. We do have a lot of collaborations, not only for the Center for Working Families, but we also just opened up a high school for healthcare, in September of last year. All the construction is done through the Resurrection Project, because they're a not-for-profit organization that is focusing on development, financial development and community development.

So the relationships with our clients has bumped to a higher level, as well as the relationships with our community partners, and as well as with our funders. After this integrated approach, we're able to say to our funders that we're having a bigger impact in our communities, we're not only meeting but exceeding the goals. It's still challenging sometimes, but I think that if it wasn't for the integrated approach that we've been taking, we would have been caught by surprise by the recession.

And although the recession hopefully is not staying like this forever, this gives us a greater opportunity to really work with the community and meet their needs, and offer them other services that otherwise other organizations in the city would not be able to offer them. The one-stop, still nowadays in Chicago, their primary focus is basically assisting people to apply for unemployment, qualify for unemployment and job placement. And the Center for Working Families is actually another one-stop. We don't do the unemployment benefits, however, we help people to build better economic stability for their families and their communities. I think that it is definitely worthwhile, yes.

**NEWCOMER:** Well, thank you. And so as a wrap-up question, in 30 seconds or less, to be respectful of everyone's time, now that we're getting on to 4:30, I was hoping that each one of you could give one piece of advice that you'd give to organizations that are interested in moving in this direction to providing integrated services with public funding.

**CERVANTES:** For my part, I will say communication and building strong relationships is a big thing that we've been doing, and it has been effective. Building strong rapport with public funders as well, initiate collaboration with other organizations. I think that one of the things that we did is not reinvent the wheel, when the wheel already exists in the community, such as the financial piece. So don't believe that we can do it all on our own, there's other partners that can help us out to do this. And then also internally, don't forget about the internal alliances in your organization, your development department and your accounting department.

**NEWCOMER:** Great. Thank you, Yesenia. Donna?

**TAGLIANETTI:** I would say be flexible. I think that you have to be looking for opportunities, and being creative about how those can work for your Center. You know I think that the other piece of advice I would have is to really believe in collaboration. I think collaboration is a great word that everybody sort of throws around and everyone wants to say that there are – a collaborator – a good collaborator. But that takes a lot of work, it takes communication, it takes commitment, and a real belief that you aren't – as Yesenia said, you can't do everything. And so I think being flexible and being realistic about your own abilities and where you need partners is really helpful in getting this done.

**NEWCOMER:** And with that, I just want to thank all three presenters, Susan and Donna and Yesenia for your time and for your insights into this approach and seeking out funding. And thanks, everyone, for being on the call, we appreciate your interest in the approach, and are happy to answer questions as time goes on and you start to get into some of the nitty-gritty of implementing these programs and seeking out public funds. Thanks, and have a great afternoon.

END