

Welcome to the CEO/MF SIF Newsletter

Welcome to the inaugural issue of the CEO/MF SIF Newsletter! The Mayor's Fund to Advance New York City, in collaboration with the NYC Center for Economic Opportunity (CEO), MDRC, and eight cities, was awarded the federal Social Innovation Fund (SIF) in July 2010. The SIF is a unique opportunity for cities to work together to expand and test innovative anti-poverty programs.

Through our Learning Network, providers and other partners will be able to learn from each other, and spread our knowledge to the wider anti-poverty community.

Ultimately, we hope that the evidence we build from these projects will lead to the adoption of our effective anti-poverty strategies by Federal funders and others across the country.

The Learning Network team has created this newsletter to share information about program development, best practices and evaluation results. We hope you enjoy our first issue.

Story ideas? Contact
Newsletter Editor
Sinead Keegan at
Skeegan@cityhall.nyc.gov.



Center For Economic Opportunity
Veronica M. White, Executive Director

Mayor's Fund to Advance NYC
Megan Sheekey, President

Providers Launch Learning Network in New York City

The New York City Center for Economic Opportunity (CEO) and the Mayor's Fund to Advance New York City (MF) were thrilled to welcome representatives of our 18 Social Innovation Fund (SIF) non-profit providers and their partners to New York City on May 5 and 6. Providers were joined by Mayor Michael R. Bloomberg of New York City, Mayor AC Wharton of Memphis and other innovation leaders for the first convening of the CEO/MF Social Innovation Fund Learning Network.

The Learning Network offers a venue for providers and researchers to share best practices with the public, provide opportunities for non-profits to collaborate on program improvements, and engage additional stakeholders, including

policymakers and other national experts. The CEO/MF SIF providers represent a range of organizations across eight cities, including social service agencies, community colleges, a city agency, and settlement houses. At the Learning Network kickoff, a community of providers began to take shape as attendees learned about the work of their fellow subgrantees.

A dynamic panel discussion, moderated by Veronica M. White, the Executive Director of CEO, addressed the variety of ways SIF programs and research can inform future national and urban policy. Paul Carttar, the Director of the SIF at CNCS, shared his vision of the opportunity presented by the Social Innovation Fund. Through the SIF, "the Obama (continued on page 3)

Families Save for Their Futures through SaveUSA

This tax season, over 1,600 families in four cities chose to jumpstart their savings by opening a SaveUSA account. SaveUSA was our first SIF program to begin serving participants. SaveUSA builds on the opportunity for savings created by the sizable EITC refunds received by individuals in low-income working households. The program offers eligible individuals a 50% match if they deposit a portion of their tax refund into a "SaveUSA Account" and maintain the initial deposit for approximately one year. During the 2011 tax season, SaveUSA participants set aside more than \$850,000 in savings, making them eligible for up to \$426,000 in matched funds if the savings are retained for one year.

The SaveUSA program operated in 16 sites managed by four SIF providers: the Community Action Project of Tulsa County, the Food Bank for

NYC, Newark Now and the United Way of San Antonio & Bexar County. The providers did an amazing job launching the program in a very tight time frame, with the support of MDRC and the NYC Department of Consumer Affairs' Office of Financial Empowerment (OFE). OFE provided valuable lessons from their \$aveNYC experience.

In Tulsa and NYC, MDRC is evaluating the program using a randomized control trial that will follow program and control groups for several years to look at savings rates, debt reduction, and use of savings to avert hardship or make important family purchases. We hope that positive research findings from this study may help this program become federal policy. The Savers' Bonus bill, introduced by Senator Menendez in 110th Congress and to be reintroduced shortly, would support a similar tax-time savings incentive.

SIF PARTNER PROFILE WorkAdvance in Tulsa



Christopher Bernhardt leads the Transportation Connections WorkAdvance program at Madison Strategies Group (MSG) in Tulsa, Oklahoma. MSG is one of four WorkAdvance providers, including Per Scholas and St. Nicks Alliance in New York City and Towards Employment in Cleveland and Youngstown, and was selected through a competitive process which included input from the Mayor's office and local funders and partners.

Christopher recently moved from New York City to Tulsa, Oklahoma to oversee the startup and operation of this new initiative. Originally attracted to workforce development through a passion for teaching, Chris brings this same enthusiasm for his work to his role as Program Director, where he is developing a program that will help participants gain access to and advance in quality jobs in the transportation industry.

Using the WorkAdvance model, Chris is identifying the needs of local Tulsa businesses and working with local educational providers to meet those needs. He brings to the project a talent for building strong teams and a focus on innovation. For example, he commits time every Friday for his team to brainstorm new ideas or ways to improve (continued on page 3)



Mayoral Support of the Social Innovation Fund

“For far too long, widespread poverty has been regarded as a troubling but inevitable condition of life in American cities, and that’s something that our administration a long time ago decided was something we could not accept.”

-New York City Mayor Michael R. Bloomberg

Under Mayor Bloomberg’s leadership and through the Social Innovation Fund, the NYC Center for Economic Opportunity has created a network of mayors committed to reducing poverty through innovative new programs. As the only local government funded by the SIF, the CEO/MF project provides a unique opportunity for these mayors and their cities to work together to expand and test promising anti-poverty programs. As we have launched the initiative, mayors have found a variety of ways to express their support for the SIF solutions, including by holding press conferences and attending launch events.

One member of this network is Mayor AC Wharton of Memphis, who explained why he joined Mayor Bloomberg in this effort, saying, “When things get rough in New York City, they get rough in Memphis, Tennessee. That’s the real world we’re living in today.” Mayor Wharton’s commitment to innovation and the SIF stems from his belief in its impacts: “No, we cannot save the world, but we can empower the people and the people will save the world.”

The success of the CEO/MF SIF relies on local government leaders to support and design programs that can best respond to local needs and conditions. CEO/MF collaborates with dedicated staff members in each mayor’s office that support the SIF initiatives and plan to use program evaluation results to inform future policymaking and funding decisions. This partnership of local governments builds on other collaborative efforts, including Cities for Financial Empowerment (CFE) led by the NYC Office of Financial Empowerment. New York City, Newark,

NJ and San Antonio, TX are all members of CFE, a coalition that brings together municipal governments to advance innovative financial empowerment initiatives. Through these and similar coalitions, local governments learn from each other’s successes and obstacles. CFE member and SIF-supporter Mayor Cory Booker of Newark (pictured below) joined Newark Now, the SaveUSA provider in Newark, to launch this tax time savings program.

Mayor Bloomberg has described the potential of this partnership well, saying: “We can help more Americans become independent individuals and parents who invest in their own success, and the success of their families and their communities.”



Providers Launch Learning Network in New York City

(continued from page 1) administration has put resources behind a strategy that recognizes that there are community-based solutions that are performing at an extraordinary level of effectiveness,” according to Carttar. Now, the role of the subgrantees is to “do a great job,” to help build evidence that this strategy works. Paul was followed by Gordon Berlin, President of MDRC, who discussed the value of evaluation. Read more about his remarks in the “Evaluation Highlights.”

The New York City Department of Consumer Affairs Commissioner Jonathan Mintz discussed his dedication to the SIF project and shared advice on ways to advocate for programs that work. Mintz emphasized that it is never too early in a project to begin outreach to decision makers, “the SIF is an extraordinary tool to move your ideas into policy.” Commissioner Mintz shared his team’s strategy, which uses “not just the promise of SIF, but the fact of SIF” when advocating for asset building programs and other initiatives.

The convening allowed subgrantees to understand how their organizations and their efforts fit into the larger SIF initiative, and to share their aspirations for their programs and the SIF. Mayors Bloomberg and Wharton addressed the attendees, explaining why the Social Innovation Fund projects are priorities for their cities. Each of the five program teams – Family Rewards, Jobs-Plus, SaveUSA, WorkAdvance and Project Rise (formerly the Young Adult Program), had opportunities to gather and discuss program design and implementation. Three program teams visited New York City program sites, to see models in action, and meet staff and program



participants. New York City Deputy Mayor for Health and Human Services Linda Gibbs and SIF Program Coordinator Sinead Keegan facilitated a lively conversation about the future of the Learning Network.

Attendees participated in cross-program capacity building sessions, designed to equip providers with tools to tackle issues they will face as they launch their SIF program. The two popular sessions were a discussion of effective uses of social networking, and a panel on the fiscal management of SIF awards.

It was clear from this gathering that partners are eager to learn from each other, and to share experiences with fellow providers and with the wider social service community. The CEO/MF Learning Network will build on this initial success and continue to be shaped by the experiences and contributions of all partners, in order to build a robust network.

“The Learning Network is a key part of what we are trying to build and develop through the SIF. There is nothing like in-person conversations to establish lasting partnerships.”

-Veronica White, Executive Director, CEO

WorkAdvance in Tulsa

(continued from page 2) operations. He says he emulates this practice from innovative organizations like Google, and calls this the team’s “FedEx” time, because “unlike most brainstorming, this comes with an expectation of really delivering”. In addition to contributing to innovative solutions, he credits this practice with helping to build motivation and ownership among his team.

Chris is looking for MSG to make its mark within the broader Tulsa community, seeing the potential for WorkAdvance to be a catalyst for further cooperation among the many community-based organizations, faith based organizations, businesses and government in Tulsa. “There is already a lot of great collaboration occurring and I look forward to being part of that network,” he said.

According to Jim East of the Tulsa Community Foundation, “Chris has been working overtime to meet with everyone, from members of the faith-based community to some of our largest employers. We’re all excited for the WorkAdvance program to help those who unemployed and underemployed here in Tulsa.”

During several trips in preparation for his eventual move, Chris was inspired by the kindness and concern he felt in Tulsa for low-income populations and by the vibrancy of the business community. On a personal level, Chris was thrilled to make the move to Tulsa, bringing him and his family much closer to their native home of Dallas, Texas.

Evaluation Highlights:

Thoughts from MDRC President Gordon Berlin

The CEO/MF SIF subgrantees at our Learning Network launch in New York City had the chance to hear from Gordon Berlin, President of MDRC, who took the time to recognize the incredible opportunity presented by the Social Innovation Fund. Berlin challenged the audience to reflect on the enormous responsibility that comes with this honor. “As SIF winners we have an opportunity to change the public debate about whether social programs can work in urban areas,” Berlin explained, “about whether we can really make a difference for people.”



Berlin also spoke specifically about MDRC’s role in helping providers meet our collective goals of having an impact on the lives of low-income children, families, and adults, while also building a national body of evidence supporting what works. Through extensive technical assistance around the program models, MDRC will help partner cities with implementation, and lead program evaluations, ensuring that all SIF programs are continuously improving and are the strongest they can be. In essence, MDRC’s independent evaluations will set out to answer three questions: What difference did this program make? How did it do so? And why did it do so?

While acknowledging that independent evaluation can at times seem threatening, Berlin stressed that “it is also essential for taking innovation to scale,” reminding us all of the importance of the SIF project’s mission of testing and expanding anti-poverty programs.

Sharing Your Story of the SIF

The SIF is an exciting and unique project that forges a vital public-private partnership. The Federal investment, combined with local and private investments, enables us to grow promising, innovative, community-based solutions that have evidence of compelling impact. Because evidence is at the heart of the SIF, we want to share the stories of the CEO/MF SIF and our subgrantees with as many people as possible. CEO staff have been sharing the stories with elected officials, legislative staff, Federal agencies, opinion makers, and community leaders from around the country, informing them of the importance of the SIF. If you would like to share your stories, and add to the growing number of voices positively affected by the SIF, please reach out to your CEO/OFE program manager.

Financial and Compliance Training Webinar

Allowable costs. Circular A-122. Timesheets. Criminal History Checks. On June 6 and 7, the Mayor's Fund and MDRC Fiscal and Compliance Team (FACT) held webinar-based trainings to help the staff of our various subgrantees understand how these intimidating-sounding terms apply to their SIF grant and can help subgrantees manage their programs. If you still have a question about managing your award, please refer to the "Managing Your Social Innovation Award" guidelines. Also, you can always reach out to Amy Pemble (Amy.Pemble@mdrc.org), Ari Oppenheim (Ari.Oppenheim@mdrc.org) or Susanne James (SJames@cityhall.nyc.gov) who will be happy to provide guidance.

Corporation for National and Community Service (CNCS) Update

The Mayor's Fund's 18 SIF subgrantees are part of an initiative much larger than our project. They join 130 other innovative organizations from 31 states as the inaugural group of SIF subgrantees. The Mayor's Fund is one of 11 inaugural grantees of the SIF, an initiative of the Corporation for National and Community Service. The Mayor's Fund, and each of the 11 intermediary organizations conducted highly competitive sub-grant competitions to select local community organizations. Over 500 organizations engaged in these competitions. The selected organizations range from local non-profit organizations to academic institutions to local public agencies and more. To learn more about our partners in innovation, please visit the CNCS website. There you can find out more about the promising, innovative community-based providers that are having an impact in the three SIF areas of priority need: economic opportunity, healthy futures and youth development.



Click on the map to learn more and see a map of the SIF <http://www.nationalservice.gov/about/programs/innovation>.

"There are community-based solutions that are performing at an extraordinary level of effectiveness..."
-Paul Carttar, CNCS Director of the Social Innovation Fund

CEO/MF SIF Subgrantees

Family Rewards, a conditional cash transfer program

- Seedco, BronxWorks, and Children's Aid Society (Bronx, NY)
- Seedco, Porter-Leath, and Urban Strategies Memphis Hope (Memphis, TN)

Jobs-Plus, a place-based workforce program

- BronxWorks (Bronx, NY)
- San Antonio Housing Authority (San Antonio, TX)

Project Rise, an education-conditioned paid internship program

- Catholic Charities of Kansas City- St. Joseph (Kansas City, MO)
- FEGS (Bronx, NY)
- Full Employment Council (Kansas City, MO)
- Henry Street Settlement (New York, NY)
- Kingsborough Community College (Brooklyn, NY)
- Rutgers University T.E.E.M Gateway (Newark, NJ)

SaveUSA, a tax time matched savings initiative

- Community Action Project of Tulsa County (Tulsa, OK)
- Food Bank for NYC (New York, NY)
- Newark Now (Newark, NJ)
- United Way of San Antonio & Bexar County (San Antonio, TX)

WorkAdvance, a sector-focused employment program

- Madison Strategies Group (Tulsa, OK)
- PerScholas (Bronx, NY)
- St. Nicks Alliance (Brooklyn, NY)
- Towards Employment (Cleveland & Youngstown, OH)

"What we want to do is find those solutions that'll work not just in one place, but can work in five places and then maybe before you know it, it's working in the country as a whole"

- Linda Gibbs, NYC Deputy Mayor for Health and Human Services

Special Thanks

The Mayor's Fund, the Center for Economic Opportunity and MDRC would like to thank all partners and supporters. To date these include the Corporation for National and Community Service, Bloomberg Philanthropies, Open Society Foundations, The Rockefeller Foundation, Altman Foundation, Annie E. Casey Foundation, Catholic Charities of San Antonio, Ewing Marion Kauffman Foundation, Ford Foundation, Fund for Our Economic Future, Goldman Sachs, Ira W. DeCamp Foundation, Morgan Stanley, New York Community Trust, Robin Hood Foundation, Tiger Foundation, Tulsa Community Foundation, United Way of Greater Kansas City, United Way of San Antonio & Bexar County, Victoria Foundation, and W.K. Kellogg Foundation.

The Mayor's Fund and CEO are seeking additional private funds to support this innovative initiative. Please contact the Mayor's Fund at (212) 788-7794 or visit the website at www.nyc.gov/fund.

• Cleveland • Kansas City • Memphis • Newark • New York City • San Antonio • Tulsa • Youngstown •