

When Collective Impact Works

Exploring Financial Resiliency and Mobility

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LIVE UNITED

**United
Way**



The Case for Integrated Service Delivery

Even with jobs, families struggle to achieve economic security and success

“No matter how hard she works Mom can’t save money for toys or pizza.”

“There I am doing the right thing, and...trying to get it right and I’m in another hole that I’ve got to fill up.”



Background: How Did United Way Get Into This Work?

- EITC outreach and free tax preparation was United Way's gateway to integrated service delivery.
- LUWs quickly realized that EITC would not create long-term financial stability.
- Expanded work to screening and enrollment in public benefits and integrating additional services at VITA sites.
- Realized that benefits and services needed to be better integrated and easier to access.

ISD: Program Components

Intentional/well-planned integration of three cores services:

- On-site **employment** services (job placement, retention, re-attachment, and advancement)
- On-site, one-on-one **financial coaching**
- On-site access to **income supports** (public benefits, tax credits, tax return preparation)

ISD: Outcomes

- Obtaining a degree or credential
- Long-term job retention
- Increasing net income
- Increasing credit score (to be at least 650)
- Increasing net worth

ISD: Program Models

There are two basic models of integrated service delivery:

- A place-based approach in which financial stability services offered by multiple organizations are located the same physical space
- A capacity-building approach in which one organization trains its staff to offer workforce development, financial coaching, and income supports to all of its clients

ISD: Operational Considerations

- **Location.** Services should be offered in the same physical location to create a seamless client experience.
- **Outcomes focus.** Staff are responsible for client progress toward ALL outcomes.
- **Staff training.** Cross-training staff is critical to understanding how the core services work together.
- **Data.** A common data management system allows staff to collaborate and share strategies.
- **Client flow.** A consistent client flow helps coaches understand exactly where the individual is in the process.

The Role of the Intermediary

- Own the vision/direction
- Identify the “right” implementing partners and build their implementation capacity
- Monitor program implementation
- Implement fundraising & promotion strategy
- Connect to other community development efforts
- Identify “systems change strategies” to support ISD

Lessons Learned

- Three core services are mutually reinforcing
- Secure employment is critical to lasting economic improvement, but is not sufficient for economic success
- High levels of debt, expenses undermine the value of work
- Improving credit scores leads to lower expenses and asset building
- Collaboration is most effective when partners' goals are aligned and dependent on one another to achieve them
- Roles, responsibilities, program costs, and funding mechanisms must be clear and transparent

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