



ANTI-POVERTY CASE STUDY SERIES

BUNDLING SERVICES TO IMPROVE OUTCOMES: THREE CASES

Featuring:
Community Action Inc.,
Enrichment Services
Program, Inc., and Douglas
County CARES



Bundling Services to Improve Outcomes: Three Cases

November 2017

This document is intended for use by Community Action Agencies and other CSBG Eligible Entities within the Community Services Block Grant (CSBG) Network.

Publication Contributors

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Community Action Partnership

The Community Action Partnership is the nonprofit, national membership organization representing the interests of the 1,000+ Community Action Agencies (CAAs) across the country that annually help 17 million low-income Americans achieve economic security. Whether it's a Head Start program, weatherization, job training, housing, nutrition assistance, energy assistance, financial education, or any of the other 40 distinct programs, CAAs work to make America a better place to live.

Learning Community Resources Center (LCRC)

The purpose of the CSBG Learning Community is to analyze Community Action outcomes and identify effective, promising, and innovative practice models that alleviate the causes and conditions of poverty.

The Learning Community, a project of the LCRC, is an opportunity for Community Action Agencies to build capacity to increase impact by:

- Capitalizing on Peer Knowledge and Expertise;
- Creating Effective Strategies; and
- Promoting Promising Practices

The Learning Community is comprised of topical Learning Community Groups (LCGs) which consist of a cadre of agencies that are currently working on a program or service delivery strategy related to each of the LCG focus areas. Learning Community members meet bi-monthly, either virtually or in-person and assist each other by discussing “what works”, sharing data findings, solving problems, and offering support for implementing new ideas.

The CSBG TTA Resource Center is also a project of the LCRC and serves as a wonderful compliment to The Learning Community as it is the “clearinghouse” for a broad array of resources to assist Community Action with its important anti-poverty work. The Resource Center allows for electronic submission of requests for T/TA, ensures the coordination of resources, and allows experts to meet the T/TA needs of the CSBG Network. It hosts a consultant bank; a resource bank which provides a broad array of evidence-based, evidence-informed and exemplary program practice models; a shared calendar; and a discussion forum. A valuable tool, the Resource Bank includes information, toolkits, webinars, articles and other information focused on a full range of services to alleviate the causes and conditions of poverty in communities served by the CSBG Network.

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The Learning Community

The Learning Community is comprised of topical Learning Community Groups (LCGs) which consist of a cadre of agencies that are currently working on a program or service delivery strategy related to each of the LCG focus areas. The Bundling Services to Improve Outcomes LCG aims to affirm the existence of comprehensive, bundled services in the Network and identifying which bundle of services are most impactful for serving low-income families. Ultimately, the group consists of a variety of member agencies who seek to enhance their service delivery strategies and/or tracking processes.

The Learning Community follows a timeline including four phases, as illustrated below. Activities include a series of webinars, peer presentations, goal plans, implementation, and evaluation.

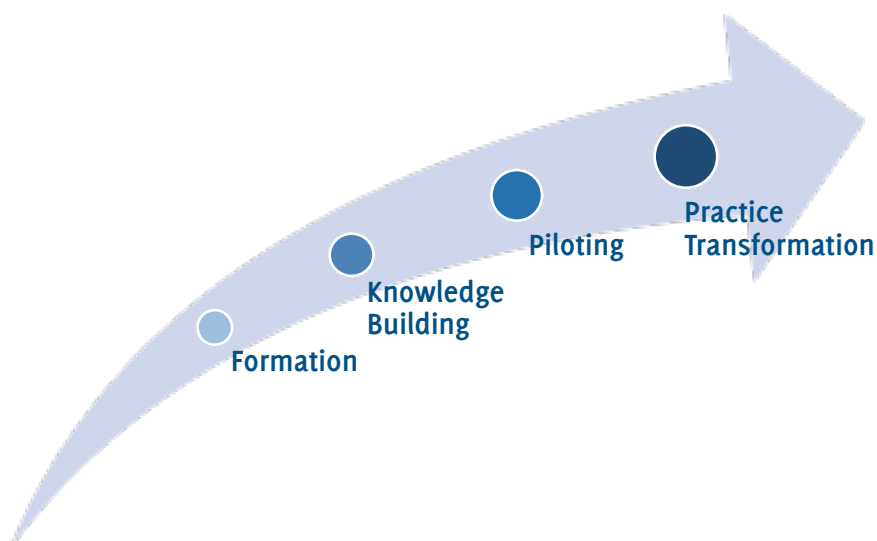
As a result of these efforts, three cases have emerged to highlight successes and challenges in implementing effective bundled

services strategies and tracking. Each went through the process depicted in the graphic above. Learning Community Group **Formation** took place first as members focused on developing participant understanding of the Learning Community model, cultivating collaborative relationships, and building a shared vision of their goal plan.

Next, **Knowledge Building** emphasized opportunities for peer-to-peer learning, and research into the broader literature on the different subject areas. During this phase, the LCGs met during an intensive period which included resource review, best-practice presentations, emerging topic presentations, and goal plan finalization.

Third, **Piloting** focused on the implementation and evaluation of the programs and strategies, including the development of related resources for use by the broader CSBG Network. LCGs were convened regularly for updates/check-in on their progress, peer-to-peer support, and training and technical assistance by Subject Matter Experts (SMEs).

Lastly, during the **Practice Transformation** phase peers shared reports on the impact of their projects and developed resources for use by the larger CSBG network.



The cases that follow will take readers through the process, from formation to practice transformation, in three different agencies across the United States. These, as well as others within the

learning community, exemplify the intention Community Action has to provide holistic services to improve the lives of low-income individuals and families and alleviate the causes and conditions of poverty.

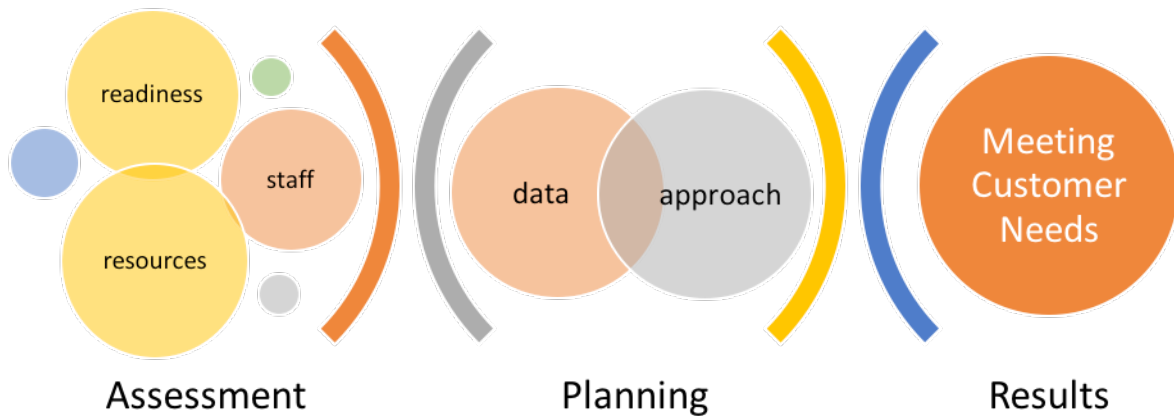


Why Bundle?

The journey toward self-sufficiency for low-income individuals and families is very complex and the fragmented system of human services delivery can be a barrier to success. Often, persons with very urgent needs and little support may have to fill out multiple applications or attend appointments in various locations to obtain necessary benefits and services. Community Action Agencies have long recognized the need to offer comprehensive services often in one location to foster access to services and to mobilize customers. Bundled services is a promising practice which strengthens this approach.

Bundled services or as some refer to it - integrated services - is the concept of coordinating access to

multiple types of services in order to empower economic stability and resiliency for customers. This approach is about much more than referring a customer to multiple programs so they can obtain additional services. Bundled services suggests a change in the organization's mindset and composition that leads to an integrative approach to service delivery on every level of the agency. A full implementation of the bundled services approach begins with the organization's assessment of its readiness to potentially engage in the realignment of staff, staff functions, organizational funding streams, data collection processes and overall approach to meeting customer needs.



The Evidence Base

Research on the Centers for Working Families initiative found that when services are bundled, clients were three to four times more likely to achieve a “major economic outcome” than were non-bundlers.¹ At Central New Mexico Community College, students who received bundled services had a 61% chance of achieving a short-term economic indicator (such as receiving a scholarship or staying in school) compared with only 16% among students who did not. Additionally, speaking to cost savings, there is growing evidence that the cost of using a bundled services strategy goes down over time, due to increased enrollments and program efficiency, which increases the impact of foundation investments. At one site in Baltimore, for example, the annual cost decreased from \$2,280 per client in the first year to \$1,031 in the third year.²

Aspen Ascend’s research has shown that components such as education, economic supports, social capital, and health and well-being are important alone, but are enhanced when used as a bundle of services for a whole family. In addition, a policy report released by the Annie E. Casey Foundation reiterates that while federal and state programs are providing critical help to many low-income individuals, they often operate in silos and in isolation from one another.³ The different funding sources, data systems, and measurements for success make it difficult for interagency collaboration and providing an effective bundle of services. For example, in Missouri alone, community action agencies report to 13 different data systems on average.⁴ This not only requires more staff time, but it is more difficult to combine data.

¹ Abt Associates. (2009) *Pathways to Success: An Interim Analysis of Services and Outcomes in Three Programs*.

² Working Families Success Network. (2013) *A Successful Strategy for Promoting Financial Stability*. <http://workingfamiliesuccess.com/wp-content/uploads/2013/10/WFSN-Overview-Case-Making-Document-101013-FINAL.pdf>

³ Annie E. Casey Foundation. (2014) *Policy Report: Creating Opportunities for Families*. <http://www.aecf.org/m/resourcedoc/aecf-CreatingOpportunityforFamilies-2014.pdf#page=3>

⁴ Missouri Association for Community Action (MACA). (2013) *Show Me Outcomes Pilot Report*. Anonymous Donor Project.

The Community Action Results Oriented Management and Accountability (ROMA) framework that Community Action Agencies operate under guides agencies away from service provision and toward a strategic thinking model. This model includes comprehensive

services and the engagement of other community partners and community members to support positive change. In turn, this works to meet the primary mission of the CSBG network: elimination of poverty/reducing the effects of poverty.⁵

Case 1: Community Action, Inc.

Community Action, Inc. is located in Topeka, KS and provides services to low-income individuals and families in 26 Kansas counties. The agency is comprised of 33 governing board members, 75 professional staff, and a variety of volunteers.

Tawny Stottlemire, Executive Director of Community Action, Inc. entered into The Learning Community to build knowledge with a goal of measurably enhancing positive results for low-income customers. She sees the internal focus of bundled services at Community Action, Inc. as a way to achieve the agency mission: Helping people move from poverty toward prosperity through economic, social, and policy opportunities. Tawny says the agency seeks to demonstrate that support is best given through an intentional, evidence-informed bundle of services, individualized for each person.

Several important steps were taken during the piloting process. First and foremost, an agency team was developed with a lead determined to spearhead the effort. The team

developed a local, agency-based theory of change to examine the assumptions behind the initiative and evaluate where current programs and services exist. Staff discussions were facilitated to gather impressions and ideas around internally bundling services. An intentional intake and referral process between departments was then implemented as a part of the pilot. Lastly, the agency considered a process map to identify natural crossroads between services.

As expected, barriers were experienced along the way. In the initial phases of bundling services across the agency, buy-in was a challenge. An organizational shift was necessary as the pilot and transformation into bundling services required changing the way business was being done and realizing the importance and benefit of the change. In addition, Community Action, Inc. faced the barrier of having no agency-wide data system. Multiple, proprietary data systems were required for various programs. Leadership continues to strive to avoid duplicative entry. Lastly, the agency

⁵F. Richmond and B. Mooney (2012) "Introduction to ROMA" Version 5.0

is still determining how to measure and evaluate outcomes for services bundled across programs.

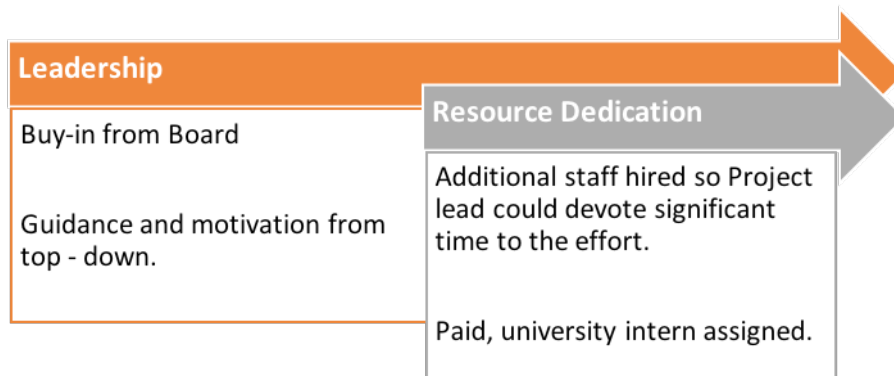
Despite barriers, current outcomes of their practice transformation include the following:

- Both Board and staff members report awareness of an active, fundamental culture shift within the agency.
- Staffing structures and budgets are being intentionally updated to accommodate a cadre of positions that will represent the gateway to all services within the agency.
- Movement is underway to develop an agency-wide information pipeline to

share data across programs and integrate with existing, required data systems.

Two main keys to success emerged, as outlined in the graphic below.

Overall the process has been beneficial as the agency has made strides toward being more integrated and bundling services effectively for clients to result in more positive outcomes. They plan to engage funding partners in the continual development and testing of the evolving model, and, to eventually develop a predictive, evidence-informed approach to understanding which combination of bundled services is likely to produce the greatest, positive impact on different customer scenarios.



Case 2: Enrichment Services Program, Inc.

Enrichment Services Program, Inc. is based out of Columbus, GA, serving nine counties in the Chattahoochee Valley region and offering various services. The agency is comprised of 21 board members, 300 professional staff, and numerous partners and volunteers.

Belva Dorsey, the agency's Chief Executive Officer, and Angel Walker, Community Services Program Manager, entered in the learning community to build knowledge with three main goals under a unified focus and approach:

1. Moving away from Silos – Agency Customer vs. Program Customer
2. Reduce/Eliminate the “Them” vs. “Us” Mentality
3. Greater/Better outcomes for families

Their picture of success includes a fully integrated approach to client services, full coordination between agency departments, and effectively moving families to self-sufficiency. These goals and desired results all work to meet the agency mission: eliminate poverty through education, services, and partnerships.

To achieve desired results and aid in breaking down silos, their pilot included first coordinating a Case Manager's Retreat to share successes and challenges, as well as begin the approach as a unified team of front-line workers. This will now be conducted annually. They also developed written procedures to ensure the same information is

available for all staff, especially in times of transition, turnover, or promotions. Joint training was also a crucial step. This helped to connect site coordinators in the community services department and key staff in the early childhood department as they serve the same families. Departments work together to use strategies that complement each other and communicate for holistic service delivery.

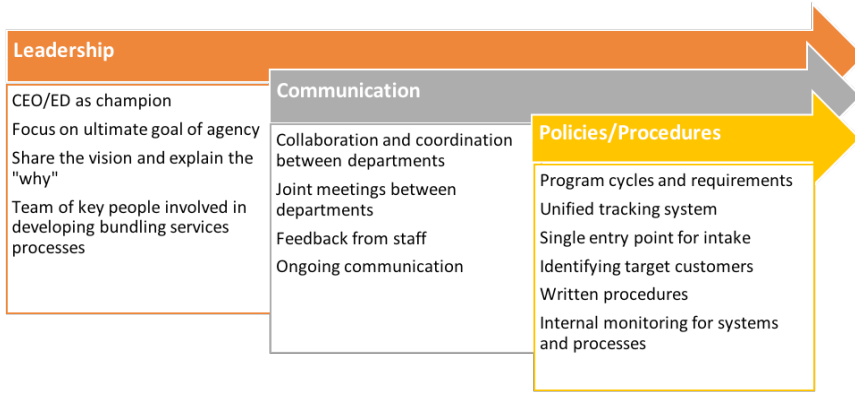
The agency encountered some barriers, such as staff buy-in and time. With changes in processes and database systems, staff had to trust leadership and adjust. The length of time required for development of the Early Childhood module of the unified tracking system was longer than anticipated. However, a few specific outcomes have already been achieved through practice transformation, these include:

- Reduction in duplicated efforts by staff and customers
- Ability to track the families' progression towards self-sufficiency
- Unified tracking that can generate reports with unduplicated numbers

Enrichment Services Program cites several “key ingredients” to making their approach a success.

Overall, they are focusing on the bundle of early childhood programs (Early Head Start, Head Start, Pre-K) and employment training services (Nurse Aid training, CDL training, and Facility Maintenance training).

These seemed to be the best services to bundle than energy assistance, for example, since many of those clients are only seen once.

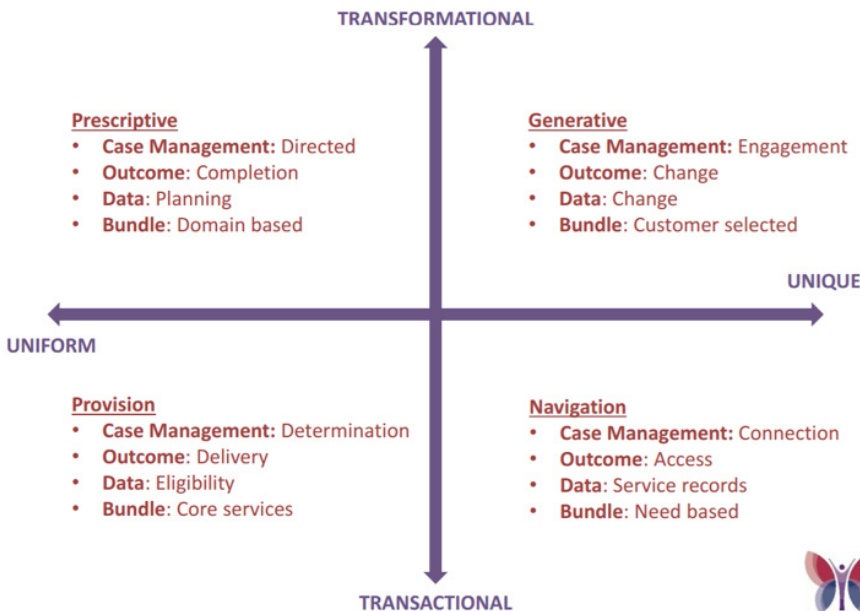


As the agency moves forward with this approach, they will be refining procedures and continuing to develop monitoring tools and processes to build on their key ingredients listed above: Leadership, Communication, and Policies/Procedures. In addition, they plan to make strides in gathering partner information and data to effectively show collective impact in their community. A customized bundled services report will be made available in the shared database as well.

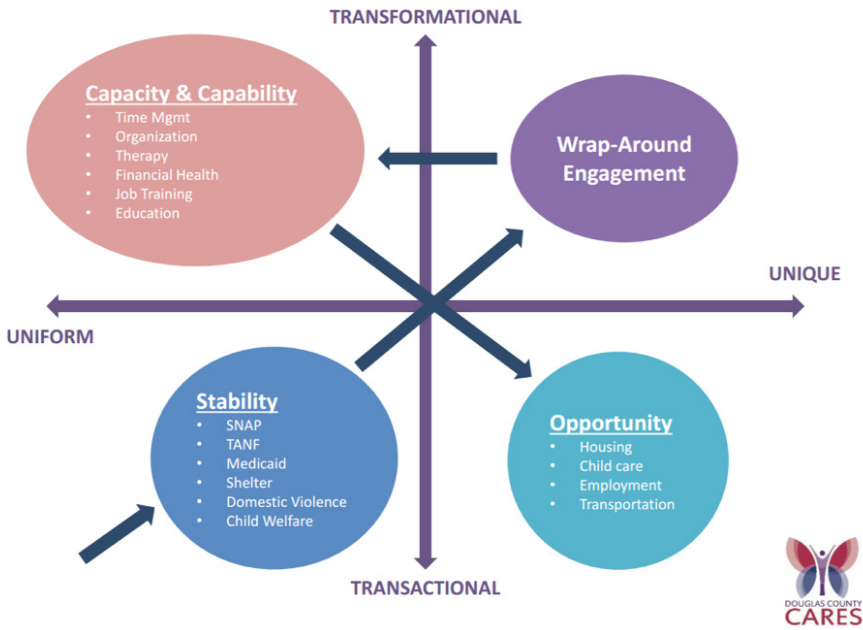
Case 3: Douglas County CARES

Douglas County Department of Community Development is a public Community Action Agency in a suburb of the Denver Metro area. The agency has a staff of one, Rand Clark. Their Community Services Block Grant budget is minimal.

Five years ago, Douglas County embarked on a journey to completely reshape the way CSBG funds were used for the local community. They realized services across the community needed to be bundled to more effectively support the individuals caught in the cycle of needing assistance. Their approach is not internal as a single agency, but external, including 13 partners across the community. This group of partners, known as Douglas County CARES, includes schools, food banks, mental health providers, government service agencies, faith based organizations, domestic violence, and more. The ultimate goal was to provide a community approach to assist individuals in obtaining self-sufficiency.



Through participation and knowledge building in the learning community, Rand was striving to examine how to be more strategic about how they bundle, while using data to more efficiently integrate services across the collaborative.



In examining the approach, Douglas County CARES first organized services in four quadrants, as seen above. The bottom two quadrants (transactional) being more staff intensive, while the top two (transformational) are more client led.

The findings from this examination caused them to rethink their Theory of Transformation. Through this, Douglas County CARES organized a system of care as their pilot – first focusing on stability, then capacity, capability, and opportunity. Customers are taken through the quadrants, generally through the pathways depicted in the graphic

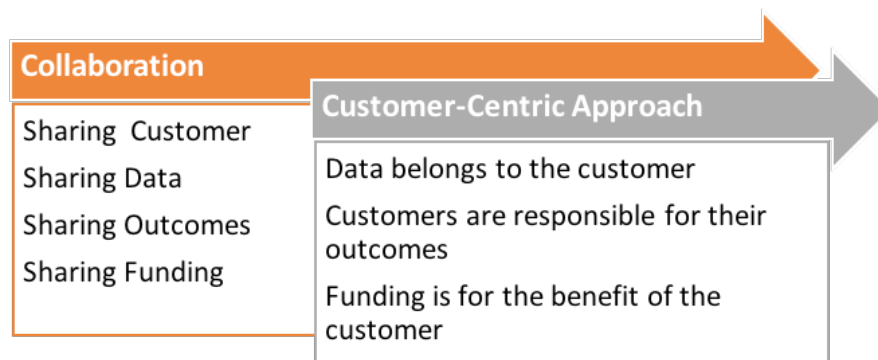
below. Bundles are built along the path that address the unique needs of the customer at that point in time. Generally, customers move from stability, into a wrap-around process, to building capacity and capability and finally to a point where they can take advantage of the opportunity to become self-sufficient.

Through this approach, Douglas County CARES has seen the following outcomes emerge through their practice transformation:

- 65% of those served obtained self-sufficiency
- 86% obtained positive housing outcomes
- 79% increased employment

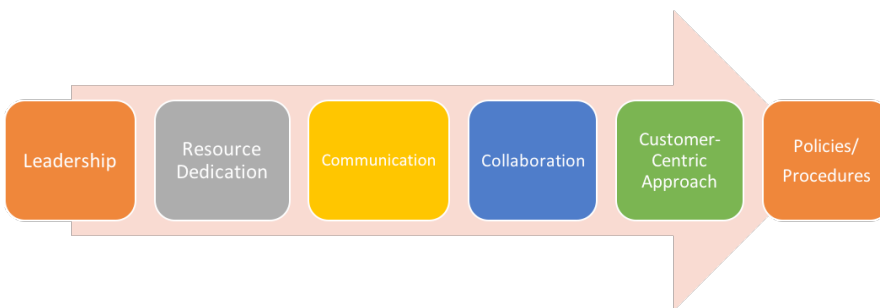
To achieve these outcomes, there have been two main keys to success. The first is collaboration and the second is being customer-centric.

Douglas County CARES has learned how to be more strategic, use data to build capacity, and increase their impact across the community. Their plans moving forward includes further implementing their approach, serving more customers, and continuing to collaborate for collective impact.



Conclusion

Across the three cases, there are keys to success that are either common or related within various approaches to bundling services, whether focused within the agency or across the community. Communities across the nation have unique needs that Community Action Agencies have the special purpose to address accordingly. This requires unique services, as well as service delivery strategies to effectively meet those needs. Each agency that strives for this holistic approach will determine the approach that works best for their customers and the community they serve, but the keys to success in the graphic below can be leveraged in any approach for ultimate success.



Thank you to our case study participants:

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For More Information

View the April 6th Learning with the Learning Community Webinar Presentation

<https://lcrweb.com/2017/04/13/learning-with-the-learning-community-bundling-services-to-improve-outcomes/>

Resources Shared From the Bundling Services LCG

www.lcrcweb.com/resources/

Building a Two-Generation Approach to Improving Family Economic Security and Well-Being

This presentation explains the importance of two-generation services in the alleviation of poverty. Agencies will learn how to effectively bundle parent and child services to best serve their community.

www.lcrcweb.com/2016/09/08/building-a-two-generation-approach-toimproving-family-economic-security-and-well-being/

Data Analytics and Siloed Data

This presentation walks through the various aspects and challenges of creating a bundling cooperative in your community and the role of data in bundling services.

www.lcrcweb.com/2016/10/04/data-analytics-and-siloed-data/

An Integrated Approach to Fostering Family Economic Success

This report provides insights into how three organizations have adopted integrated approaches in response to different local circumstances and opportunities.

www.lcrcweb.com/2016/05/26/an-integrated-approach-to-fostering-familyeconomic-success/

Making Tomorrow Better Together Brief

This report from the Two-Generation Outcomes Working Group is designed to set a foundation for how practitioners and policymakers consider the intended outcomes of two-generation programs and the pathways to achieve those outcomes.

www.lcrcweb.com/2016/05/26/making-tomorrow-better-together-brief/

Lessons Learned from the Bundled Services LCG

This presentation looks at key success factors for planning, implementing, and evaluating bundled services approaches.

www.lcrcweb.com/2017/09/21/lessons-learned-from-the-bundled-services-lcg/

Putting Research into Practice: Two-Generation Approaches

This report provides an overview of two-generation programs and offers tips for developing and improving them. It also synthesizes research on two-generation programs into five categories: Intergenerational Poverty Data, Two-Generation Program Need, Program Implementation/Promising Practices, Two-Generation Program Types, and State Policy Information.

www.lcrcweb.com/2016/05/26/putting-research-into-practice-two-generationapproaches/

Putting Research into Practice: Bundled Services

This practice brief synthesizes research on implementing and financing bundled services approaches. It includes information about Bundled Services, Blended or Braided Funding Streams, Pay for Success Models, and Funding Guides for Specific Program Types or Populations.

www.lcrcweb.com/2016/06/16/putting-research-into-practice-bundled-services/

Scaling Up, Scaling Out: Lessons from Goodwill of Central and Southern Indiana and Nurse-Family Partnership

This report summarizes the lessons learned from the partnership between Goodwill of Central and Southern Indiana and the National Service Office of Nurse-Family Partnership as they worked together to expand the reach of their services horizontally and vertically. The report provides practical approaches and a vision of future two-generation solutions to poverty.

www.lcrcweb.com/2017/03/16/scaling-up-scaling-out-lessons-from-goodwill-ofcentral-and-southern-indiana-and-nurse-family-partnership/

Uplifting the Family: A Two Generation Approach Practice Brief

This Practice Brief provides agencies with case studies from an urban agency and a rural agency to help CAAs conceptualize how to think about implementation within their own agencies.

www.lcrcweb.com/2016/05/26/uplifting-the-family-a-two-generation-approachpractice-brief/

Social and Decision Analytics Laboratory: Bringing the “All” Data Revolution to Communities

This presentation offers tools to help identify metrics, measure success and use data to reflect your community. It provides the best ways to gather relevant and substantive information from large amounts of data.

www.lcrcweb.com/2017/03/16/social-and-decision-analytics-laboratory-bringingthe-all-data-revolution-to-communities/



The Promise of Community Action

*Community Action changes people's lives,
embodies the spirit of hope, improves communities,
and makes America a better place to live.*

*We care about the entire community,
and we are dedicated to helping people
help themselves and each other.*

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