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Executive Summary

LIFT's mission is to help community members achieve economic stability and well-being. During the 1st year of LIFT's proposed program, 30 AmeriCorps members will leverage an additional 750 volunteers to support 11,000 low-income community members in Boston, Chicago, Los Angeles, New York, Philadelphia and Washington D.C. as they work stabilize their lives. In 11 resource centers across the country, LIFT AmeriCorps members and LIFT recruited volunteers will work one-on-one with clients, helping them find jobs, secure housing, access public benefits and tax credits, and obtain referrals for critical services like food assistance and healthcare. AmeriCorps members will provide direct support to clients, recruit and train volunteers, and strengthen community partnerships in LIFT's 6 regions. At the end of the 3 year grant period (July'13-June'16), LIFT will have placed 30,000 individuals on a path to economic success - securing 1,275 jobs and generating \$50 million in wage increases, tax refunds, public benefits, and housing assistance. By helping clients set goals, access resources, and develop the confidence and community networks needed to sustain their economic gains, LIFT AC members and volunteers helps clients improve their well-being. This program will focus on the CNCS priority area of Economic Opportunity, with secondary emphasis on Veteran and Military Families. The CNCS Fixed Amount grant of \$370,500 will be matched with \$6 million in organization wide private funding during the first year of the grant.

Rationale and Approach

The Problem: Families in America are struggling. 1 in 3 Americans is living at or near poverty and 127.5 million people are living paycheck to paycheck. Of those who move out of poverty, nearly two-thirds will move into poverty again within 5 years. These individuals are standing on shaky ground; a crisis could send their families into a downward spiral, negatively impacting their trajectory. Life is complicated no matter one's economic situation, but it is especially challenging when low-income individuals find themselves standing on shaky ground - unemployed and lacking the networks they need to find solid footing. Community members struggling with unemployment need more than financial assistance; they need help plugging into the economy; they need help accessing services. They need an advocate.

Community Need: LIFT believes that all people, regardless of socio-economic status, need the following three-dimensional supports to overcome poverty's cycle of crisis and move ahead in life: economic resources (money in our pocket); internal capabilities (self-confidence, problem solving

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skills); strong community networks (people in our corner). LIFT's client population reflects the following demographics: 54% are African American, 57% are women, 75% are unemployed, 40% are homeless, 54% have children, 14% have limited English proficiency, 4% are seniors, 5% are veterans, 68% are receiving public benefits. LIFT supports low-income individuals in Boston, Chicago, DC, LA, New York, and Philadelphia with 11 sites located in high poverty areas. Low-income individuals face many challenges navigating the local social service system. To address this, we situated our sites in accessible neighborhoods, often co-locating with community programs, in order to provide an accessible and welcoming "home base" for clients. LIFT-Boston serves the cities of the Cambridge, Somerville, and Boston (Roxbury neighborhood). According to the 2010 Census, 15% of Cambridge and 40% of Somerville families with a single female head of household live in poverty. Last year, 25.2% of Roxbury residents received Food Stamps and 10.9% were unemployed. LIFT-Chicago serves the Uptown and Pilsen communities, located in the 60640 and 60608 zip codes. According to the 2010 census, 27% of people in 60640 and 34% of people in 60608 live in poverty. 85-99% of students who attend schools in these areas are eligible for free/reduced school lunch. LIFT-DC operates in Wards 6, 1, and 8, with sites specifically located in census tracts 47.01, 28.02, and 74.09. According to the 2010 Census, 49% of people in census track 47.01 and 21.6% in track 28.02 live in poverty. In census track 74.09, 14.8% are unemployed and 38.1% received Food Stamps. LIFT-LA is located in South Los Angeles, where the poverty rate for children is 65%, unemployment is 17%, and per capita income is \$5,836. LIFT-New York operates in the Bronx, a borough with 13.1% unemployment. According to the 2010 Census, 28.3% of Bronx residents received Food Stamps last year. LIFT-New York's neighborhood (Belmont/Morrisania) has a 32.7% poverty rate. LIFT-Philadelphia has offices in the west and north sections of the city, located in census tracts 84 and 141. According to the 2010 census, 25.3% of census track 84 residents received Food Stamps. In census track 141, 47.8% live in poverty. Unemployment in these tracks ranges from 10.9% to 17.9%. (Citations: "Near Poor, Not Quite in Poverty But Still Struggling," New York Times. "Transitioning In and Out of Poverty" Urban Institute. "Kids Count Data Snapshot," Annie E. Casey Foundation. 2010 Census: State/City Data. "Taming the Perfect Storm," Health and Human Rights Journal)

B. AmeriCorps Members as Highly Effective Means to Solve Community Problems

NOTE: For the purpose of clarity, "AC members" or "member" refers to the AmeriCorps members hosted by LIFT; "volunteer" refers to LIFT's college student and community volunteers. These are separate roles.

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Member Activities and Impact: LIFT's mission is to help community members achieve economic stability and well-being. LIFT runs 11 sites where we employ a powerful volunteer model to support low-income individuals as they work to stabilize their lives. When clients come to LIFT, they are connected with an AC member and/or volunteer who helps them move their lives forward. LIFT's AC members and volunteers work one-on-one with clients to find jobs, secure housing, access public benefits/tax credits, and obtain referrals for services like food assistance and healthcare.

Simultaneously, the LIFT experience pushes AC members, volunteers, and clients to grapple with our communities' most challenging issues related to poverty, inequality, and policy. Over the last 14 years, LIFT supported 70,000 clients on their path to stability and engaged 10,000 volunteers in this effort. The incorporation of AmeriCorps members helped drive this success. Currently, 24 full-time AmeriCorps members serve at LIFT's 11 offices. LIFT's AC members work one-on-one with clients and support the recruitment and training of LIFT's annual corps of 750 volunteers. These volunteers also provide direct support to clients, dedicating 5-30 hours a week to LIFT. In this way, one LIFT AmeriCorps member leverages 25-35 additional volunteers in service to a community. Since 2010, LIFT's AC members have helped LIFT increase the number of clients served by 57% and the number of volunteers engaged by 33%. During our previous grant: AC members helped provide direct service to 22,000 clients, built relationships with 15 new university partners, and recruited and trained 1,800 volunteers. Without the major contribution of our AC members, LIFT would not be able to leverage the resources needed to help support the number of low-income families LIFT currently serves on a path to economic stability and well-being. LIFT requests 30 full time AC members to support its strategic plan priorities of serving 65,000 clients over the next 5 years. The increase to 30 members will allow LIFT to expand its AmeriCorps program to its recently launched site in LA while continuing important work in Boston, Chicago, DC, New York, and Philadelphia. With this grant, LIFT's AmeriCorps members' responsibilities will include:

Work Plan Area 1: Place Clients on a Path to Economic Stability and Well-Being: Work one-on-one with clients to find jobs, secure housing, enroll in public benefits/tax credits, and obtain referrals for social services. Maintain records, including electronic records in Link and the Exchange, LIFT's online case management system and volunteer/staff intranet, to support client service. Garner client feedback via client advisory boards and feedback session to strengthen services. Support outreach efforts including direct client outreach and strengthening referral partnerships with social service

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providers. Work Plan Area 2: Volunteer Recruitment, Training, and Support: Recruit college student volunteers from local campuses by attending volunteer fairs and building relationships with professors/administrators. Recruit community members (former clients, retirees, corporate professionals) to volunteer at LIFT. Co-facilitate new volunteer training with the Program Manager. Organize bi-weekly trainings for volunteers on issue areas such as employment and housing. Coordinate community partners to lead trainings on topics related to their expertise. Support to volunteers in direct client service. Utilize inter/intra office resources to promote best practice sharing. Work Plan Area 3: Community Partnerships: Work with Program Manager to develop and maintain partnerships with universities and community agencies.

C. Evidence-Based/Evidence-Informed and Measurable Community Impact

The Intervention: LIFT believes in a simple-yet-revolutionary idea: that people in poverty need the same support we all need when we face moments of crisis. After over a decade of providing services to individuals in need, we've learned that stability is about more than income. It's about strengthening a person's internal capabilities (self-confidence, problem solving skills), building community networks (people in your corner), and ensuring they have access to the economic resources (employment, housing) they need to stabilize their families. AC members and the trained volunteers they recruit build sustained relationships with clients to understand their circumstances. Working side by side, they set goals, and make connections to resources to move their lives forward. AC members and volunteers help clients find jobs, secure housing, access public benefits/tax credits, and get connected to social services. Each client success is unique: Angela secured a job that enables her to serve the community, Joe obtained veterans benefits, but the thread that connects their stories is the relationship with an AC member or volunteer. This is the backbone of LIFT's work.

Internal Evidence and External Research: Last year, LIFT drilled down into its data (20,000 records from the last 2 years) to determine what aspects of its model were correlated with high client success. When we analyzed our success stories, we found that the common characteristic was a strong relationship with an AC member or a volunteer. The more trusting a relationship, the more likely clients were to come back for more meetings. The data also showed a strong correlation between the number of meetings and the number of resource connections and outcomes secured (employment, food assistance, housing, referral services). Through this analysis, we realized that clients who engaged in long-term relationships with AC members or volunteers were more likely to achieve key

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milestones on their path to stability than individuals who came to LIFT for a one-time service. To further support the evidence basis for LIFT's relationship and well-being focused intervention, we did a qualitative assessment of client feedback and found that clients who achieved at least one major outcome (living wage job), all reported explicit volunteer and AC member support on internal (self-confidence, problem solving) and community dimensions (strong community networks) of well-being. The impact of the LIFT client volunteer relationship on these dimensions of well-being and the role it plays on sustained success is reported in all client testimonials. "My self esteem has gone up." "They gave me more than helping me to find employment." LIFT's internal evaluation data from last year and research from the field provides additional support for our intervention. LIFT secured 2.5 major outcomes (jobs, housing) for every individual engaged in a long-term relationship (3+ meetings) with an AC member or volunteer. LIFT generated \$13.7 million in wage increases, tax refunds, public benefits, and housing assistance for its clients, providing \$1,245 in value for the average client. Community impact research demonstrates that a \$1,000 increase in family income from employment or government transfers can improve children's test scores by 2% in math and 3.5% in reading and increase children's educational attainment and adult earnings. 750 clients worked with LIFT to enroll in public benefits programs, accessing \$4 million in public benefits. Community impact research shows that a family's purchasing power increases by 40% when they access nutritional subsidies like Food Stamps. LIFT's intervention gets people jobs, but more importantly, it helps them develop the tools to keep those jobs and build on the economic gains they make, which research demonstrates is critical for the long-term financial wellness of individuals and communities. (Citation: "Out of the Desert: An Integrated Approach to Ending Child Poverty," First Focus, S. E. Mayer, "The Influence of Parental Income on Children's Outcomes", "A New Framework for Achieving Household Financial Security," CFED). External research provides more evidence for LIFT's relationship and well-being focused intervention. The strengths-based perspective of Social Work, the Asset-Based Community Development Model of Kretzmann and McKnight, and the Positive Psychology approach of Martin Seligman have all established an evidence basis affirming relationships fosters a sense of self-confidence and community connectedness that leads to individuals achieving their goals. Nobel Prize winning economist, Amartya Sen's work advanced the concept of using a "capabilities" approach to understand poverty, which focuses on the subjective drivers of well-being (e.g. how people perceive their ability to achieve desired outcomes for their families). Sen's research demonstrated a positive correlation between persistence in employment outcomes and when people "have support" to weather tough times. (Citations: Strength Based Social Work <http://www.naswdc.org/> Kretzmann and

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McKnight <http://www.abcdinstitute.org/> Martin Seligman <http://www.ppc.sas.upenn.edu/>)

Current AmeriCorps Performance Measures: In our current grant (awarded in 2010), LIFT opted into two performance measures in the Economic Opportunity priority area. 1) Number of economically disadvantaged individuals receiving job placement and employment services: LIFT's goal: 4,500. 2) Number of economically disadvantaged individuals placed in jobs: LIFT's goal: 400. Over the last program year, LIFT provided employment services to 7,737 clients (72% over the goal) and secured jobs for 484 clients (21% over the goal). Many clients face employment barriers; we help them achieve intermediate outcomes (job readiness skills, resume creation, basic computer training) before they can secure jobs. During this period, LIFT clients experienced a 75% job interview to job placement rate.

Proposed Measures for this Recompete: EMPLOYMENT: During the next grant cycle, LIFT will opt into the same Economic Opportunity performance measures, increasing our target to reflect the program's continued success. These increases may appear conservative, but they are actually a reflection of a shift in our model to more intensively serve each client, reinforcing LIFT's relationship based approach to working with low-income clients. We determined these targets by analyzing past performance data and identifying the portion of clients that need additional job readiness support before they can be successfully placed in jobs. 1) Number of economically disadvantaged individuals receiving job placement and employment services: 5,000 2) Number of economically disadvantaged individuals placed in jobs: 425. VETERANS SERVICES: LIFT serves hundreds of veterans and their families every year (5% of clients identify as veterans). LIFT volunteers and AC members work with veterans to secure housing or rental assistance, research education opportunities, and access public benefits. This year, LIFT's Bronx Office in collaboration with the Robin Hood Foundation, launched a veterans initiative to offer integrated services to veterans and their families. The initiative is overseen by a veteran, Rosa, who first came to LIFT as a client who had lost her job and fallen behind in rent. Now as a LIFT volunteer, Rosa, along with LIFT AC members, and LIFT volunteers served 50 veterans in the first six months of this new veteran's initiative. LIFT plans to build off the success of our work supporting veterans. For this recompetite, we will opt into Measure V1: Number of veterans that received CNCS-supported assistance, setting a target of serving 350 veterans annually (based on past performance data) and create an aligned outcome measure that at least 100 veterans will achieve economic outcomes (housing, benefits) which improve their quality of life.

Measuring Performance Measures and Impact: LIFT will track the number of unduplicated

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economically disadvantaged individuals receiving job placement services and the number of unduplicated veterans receiving services at LIFT through its case management system, LIFT Link. Link measures outputs and outcomes, tracking metrics like employment and housing status and how they change (economic progress) during a client engagement. To confirm job placements, AC members and volunteers will complete an employment verification form in Link. To verify the number of veterans who achieve economic outcomes, we will create a report in Link which pulls data on the outcomes achieved by clients who identify as veterans. To enhance its evaluation infrastructure, LIFT is launching an innovative client voice system to measure client feedback and analyze the role LIFT's focus on developing clients' internal capabilities and community networks plays in sustaining clients' economic gains. LIFT will solicit client feedback on its services through microsurveys and feedback sessions. At the end of the grant period (July 2013-June 2016), LIFT will have placed 30,000 individuals on a path to economic success, providing job placement services to 15,000 clients and securing 1,275 job placements. LIFT will generate \$50 million in wage increases, tax refunds, public benefits, and housing assistance, providing an average value of \$1,316 per client. LIFT will also serve 1,050 veterans, helping them achieve outcomes which improve their quality of life.

D. Member Recruitment:

Recruitment for LIFT's AmeriCorps positions is a thoughtful process that attracts an excellent pool of candidates. 4 months in advance of the start date, LIFT posts position descriptions on an array of job sites, including the AmeriCorps website, Idealist.org, Craigslist.org, and career center websites of university and community partners. LIFT also promotes the positions to its volunteers, alumni, and former clients through email, social media, and in-person announcements. To promote a diverse applicant pool, LIFT staff reaches out to its client base and community partners. LIFT also connects to cultural and educational institutions such as Historically Black Colleges and Universities, community colleges, the NAACP, National Council of La Raza, and Black and Latino fraternities and sororities. LIFT works to ensure that the members of its AmeriCorps program are representative of the community served and have the experience and competencies (Spanish fluency) to provide effective and culturally sensitive services. As part of a larger organization wide diversity and inclusion initiative, LIFT is working to ensure greater diversity in its staff, AC members, and volunteers. In 2012, LIFT received over 1,109 applications for 24 positions, a clear indication of the high interest in LIFT's AmeriCorps positions.

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E. Member Training:

During their term, AC member will develop leadership, communication, training, public speaking, conflict management, and volunteer management and recruitment skills. All of these skills will support their member activity and responsibilities. LIFT's AC member training series consists of 5 major components. 1) Local Orientations: AC members participate in a two-week orientation at their service site, which includes shadowing client meetings, studying volunteer recruitment procedures, meeting key partners, training on technology and infrastructure, reviewing policies, and learning about the community, its history, and unique strengths and needs. 2) Leadership Training Institute (LTI): Immediately following Local Orientations, LIFT hosts an intensive Leadership Training Institute (LTI), bringing together its AC members nationwide. LTI is 4 days long, training sessions include: Introduction to AmeriCorps (including prohibited activities); LIFT's Approach to Client Service; Client Service Role Plays; Challenging Client Situations; Volunteer Training; Program Evaluation; Diversity and Inclusion; Self Care for the Caregiver. 3) Mid Year Training (MYT): LIFT hosts a 2nd national training, 7 months into the AC term, which focuses on professional development, strategic initiatives, and best practice sharing. MYT also provides transition planning support for members as they contemplate their next career steps. 4) On-Going Trainings: The majority of the ongoing member training happens locally. AC members participate in and facilitate bi-weekly trainings for LIFT's volunteers. These trainings showcase community partners discussing client service issues such as affordable housing and supporting formally incarcerated individuals. 5) Member Development Activities: LIFT regularly convenes its national AC network through conference calls, which provide opportunities for member development. Members complete a bi-weekly report that is sent to AC members and national staff. The bi-weeklies allow members to reflect on their successes/challenges and learn from other offices. LIFT maintains an online intranet (the Exchange) that is a central area for AC member to discuss best practices. Members access resources on the Exchange to aid their work and communicate with the network. Prohibited Activities: Prohibited activities are discussed at several points during a member's tenure with LIFT: during the application process, at onboarding (prohibited activities are included in the member contract which is signed by all members), and at ongoing local and national trainings. AC member supervisors are trained on and informed of prohibited activities. Any information from CNCS regarding prohibited activities is quickly disseminated to AC members and their supervisors.

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F. Member Supervision:

All members participate in weekly check-ins with their supervisors where they reflect on their work and discuss their professional and personal development. These individualized check-ins are key to ensuring members receive strong support and guidance throughout their term. AC members are supervised directly by Regional Program Managers (PMs) and PMs are supervised by Regional Executive Directors (EDs). Both PMs and EDs are selected through a rigorous hiring process. The PMs and EDs receive support in their AC supervisory role from LIFT's COO, its National Manager for Training and Staff Development, and its National Director of Administration. Member supervisors come together with other national staff members 3 times a year for additional training, professional development, and best practice sharing. Beyond their direct supervisors, members also have a support system in other national staff (including LIFT's CEO) and fellow AC members. LIFT fosters these collegial relationships through community-building sessions at trainings, bi-weekly communication across regions, and discussion on LIFT's intranet. LIFT assesses member satisfaction through communication with supervisors and 360 performance evaluations, which incorporate self and peer reviews. The evaluations provide members with feedback on their areas of strength and improvement and the opportunity to discuss additional supports they may need. Strong performance by AC members is rewarded with affirmation through formal and informal appreciation events. We believe LIFT's enrollment and retention rates speaks to the quality of LIFT's member recruitment, supervision, and support. LIFT has a 100% member enrollment and retention rate over the first 2 years of the current grant and we expect 100% member enrollment and retention in the final year.

G. Member Experience:

LIFT AC members are encouraged to embrace their AmeriCorps service as an opportunity to not only gain important career skills but also to explore their role in the national service community. In addition to the multiple ways we bring our members together in person and electronically mentioned earlier, LIFT provides many opportunities for members to reflect on their service and promote a lifelong ethic of civic participation. Every semester, AC members participate in the "Why I LIFT" program. WHY I LIFT turns the megaphone over to LIFT's AC members and volunteers, allowing members to reflect on their experience and tell their story. By sharing their experience, they gain new insights about the realities of poverty and become local drivers of the national service movement. Connecting LIFT's AC members to the AmeriCorps brand and the national service moment is important to LIFT. We link members to the State Commissions, encourage them to participate in days

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of service, and make them aware of opportunities to network with AC members in their city. During public events, AC members wear their LIFT shirts co-branded with the AmeriCorps logo and proudly identify themselves as AmeriCorps members. We also help our AmeriCorps members connect with each other through national teambuilding sessions, regional gatherings, and online discussion. LIFT invites CNCS representatives to speak at national AmeriCorps trainings and State Commission representatives to speak at regional trainings. In 2011, the former director of AmeriCorps, John Gomperts, and LIFT's former Program Officer, Martha Tierney, spoke at the Mid Year Training. This provided a great opportunity for AC members to connect with the national service movement and learn more about CNCS leadership.

H. Volunteer Generation:

The success of LIFT's service model depends entirely on volunteer recruitment, which is led by its AC members. Volunteers (non-AC members) make rigorous, long-term commitments to LIFT. Each region is staffed by 50-100 volunteers who each serve 4-12 months annually and give 5-30 hours per week. Over this 3-year project, LIFT plans to engage 2,000 volunteers in service. Those volunteers will serve 30,000 clients and contribute 200,000 volunteer hours - generating a \$4.4 million value that they are contributing to their communities (valuation by Independent Sector). Volunteers work one-on-one with low-income community members, helping them find jobs, secure housing, access public benefits/tax credits, and obtain vital social services. LIFT relies on a host of skills that volunteers are uniquely positioned to offer. For example, many student volunteers are proficient in foreign languages that minimize communication challenges with clients and expand the reach of LIFT's services in immigrant communities. LIFT also leverages non-student "community" volunteers who bring valuable learned expertise (financial and legal skills) and lived experience (former clients who know how to navigate the social service system) to the volunteer role. They ensure that LIFT is aware of community needs and the best ways to address them. AC members recruit volunteers through university activity fairs, targeted email circulation, speeches in relevant classes, and partnerships with internship/service learning programs. To ensure diversity, AC members recruit through ethnic and cultural groups on campus and develop relationships to secure work-study positions. LIFT recruits community volunteers through client and partner relationships, donor engagement events, and corporate volunteer programs. After volunteers are recruited, LIFT's AC members and Program Managers coordinate all training, support, and recognition activities. By generating hundreds of volunteers each year, LIFT builds the capacity of local communities. As with LIFT's AC members,

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LIFT volunteers are trained on prohibited activities throughout the year and closely managed to ensure they don't engage in prohibited activity. LIFT's model is an "eco-system changer" because it builds the capacity of a local social service infrastructure. LIFT builds the capacity of its university partners to educate their students and amplify community goodwill by providing an experience that brings policy and poverty lessons from the classroom into reality. Former clients who return to LIFT as volunteers demonstrate each person's capacity to make a difference in their community.

I. Organizational Commitment to AmeriCorps Identification:

LIFT is committed to branding national service. All 11 sites are required to use the AmeriCorps name in all appropriate online and print materials (brochures, business cards). The Communication Director ensures each site is compliant with the requirements. We communicate the partnership by providing LIFT/AmeriCorps co-branded apparel for our AC members that include t-shirts and hats. All recruitment, orientation, and curriculum materials for LIFT's AC positions are branded with the AmeriCorps and LIFT logos. The AmeriCorps logo is featured prominently on LIFT's annual report and its website, highlighting the service contributions of our AC members. We also celebrate AmeriCorps by sharing photos and stories of AC members through our social media platforms.

Organizational Capability

NOTE: For the purpose of clarity, "AC members" or "member" refers to the AmeriCorps members hosted by LIFT; "volunteer" refers to LIFT's college student and community volunteers. These are separate roles.

A. Organizational Background and Staffing:

LIFT's mission is to help community members achieve economic stability and well-being. We are working to establish a new standard for holistic and enduring solutions in our country's fight against poverty. LIFT was founded by its CEO, Kirsten Lodal, in 1998. Having been very involved as a volunteer in child services programs, Lodal was struck by the absence of services for the parents of the children in those programs - parents who were often working multiple low wage jobs, paying their taxes, and sending their kids to school, yet still unable to make working for poverty wages equal sustained shelter, food, and clothing for their children. Lodal founded LIFT to serve as a resource to prevent community members from falling into poverty and to establish a model for long-term committed volunteerism.

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Experience Managing and Staffing an AmeriCorps Program: LIFT began its relationship with AmeriCorps*VISTA program in 2002 when the first class of 9 VISTAs entered LIFT's then 9 Local Offices. In the first 6 months of LIFT's 02-03 program year (Sept 02-Feb 03), LIFT's performance outcomes surpassed those of the entire 01-02 program year. By the end of the year, LIFT doubled its client numbers and increased volunteer engagement by 450%. In the following period, LIFT strengthened its relationship with VISTA, growing to host 18 full-time VISTA members and 30 quarter-time Summer Associates. In 2006, LIFT received an AmeriCorps*National Direct grant, transitioning LIFT from VISTA to National Direct. The established relationship with CNCS enabled LIFT to develop strong oversight best practices for AC member supervision, program, and grant management. Based on our experience over the 11 year relationship with CNCS, LIFT believes it is well positioned to manage a 3rd AmeriCorps*National Direct grant. LIFT's staff, nationally and regionally, has years of experience successfully managing AC members and managing a strong program. LIFT's COO, Tony Brunswick, has been serving as LIFT's AC program director for the past 6 years and will continue in that role throughout this grant period. Additionally, several of LIFT's full-time staff members are AmeriCorps alumni, including the COO. LIFT consistently exceeds requirements and recommendations for pre-service and in-service training, performance reviews, professional development, and post-AmeriCorps career support. LIFT also consistently surpasses its grant performance measure goals and it has an outstanding enrollment and retention rate (100% enrollment and retention since LIFT's first National Direct grant in 2006 and 100% enrollment and 95% retention for previous VISTA grants). LIFT has never been cited for compliance issues nor have any of LIFT's members or program staff been cited for engaging in prohibited activities. LIFT traditionally has maintained a strong relationship our Program Officer and other CNCS personnel. LIFT has consistently submitting grant applications and reports on time. All sites are managed by highly qualified EDs who oversee a team of program staff, development staff, AC members, and LIFT volunteers. LIFT's EDs direct all regional operations - supervising Regional Program managers, who in turn directly manage LIFT's AC members. LIFT's EDs set programmatic goals, build community partnerships, and raise funds. Each ED has 10-25 years of nonprofit management experience, which strongly positions them to support AC members and run an efficient program. Program Managers (PMs) in each region provide direct support and supervision to AC members, supervise client service, and leads evaluation efforts. LIFT's PMs have completed MSW and MPA programs (or similar degrees); they have extensive experience supporting AC members and providing service to vulnerable populations. The PMs are part of the national Program Team which includes the National Manager

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for Training and Staff Development, and LIFT's Senior Manager of Strategy and Operations. The LIFT Program Team participates in weekly conference calls in which they discuss best practices in program management and oversight. Over the next 5 years, LIFT plans to layer in additional national and local staff to further support LIFT's AC program and its members.

Plan for Effective Financial and Program Orientation and Training and Technical Assistance: As described in detail earlier, LIFT invests heavily in program staff and member management, training, technical assistance, and skills development. LIFT's national program team is highly responsive to the technical assistance needs with several key staff members focused on supporting sites with member management, training, compliance, and program performance. LIFT's COO, LIFT's National Manager for Training and Staff Development, LIFT's Senior Manager of Strategy and Operations, and LIFT's National Director of Administration work together to provide effective financial and program orientation and training and technical assistance to the full LIFT-team. LIFT also works closely with LIFT's CNCS Program Officer and leverages CNCS online resources for technical assistance when needed. LIFT attends national CNCS conference and grantee meetings to remain up to date on CNCS priorities, guidance, and information.

Evaluation Capacity: LIFT regularly performs internal program evaluations and in 2006, it completed an external evaluation in preparation for our 1st National Direct grant. Evaluators from Campaign Consultation Inc (who were working with several new and existing CNCS grantees) reported that: "[LIFT] offers a powerful model that could be a critical partner to clients, students, communities, and other service agencies and the Corporation for National and Community Service." LIFT has had a centralized on-line case management system in place for the past 13 years. Our data gives us a very powerful way to evaluate and understand our performance over that time. Evaluation is also a major priority in LIFT's 5 year strategic plan, which kicked off July 2012. We are developing an evaluation framework which will measure the economic, internal and community dimensions of well-being for LIFT clients. LIFT has engaged Keystone Accountability, a highly respected London-based evaluation firm, to help create a comprehensive system for gathering client feedback. Within the next 6-12 months LIFT will identify a 3rd party evaluator to help design and then eventually perform a summative evaluation for LIFT during the last 2 years of the strategic plan. To put significant muscle behind LIFT's evaluation efforts, LIFT plans to hire a VP of Evaluation in 2013 and an Evaluation Associate in 2014.

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Experience and Financial Management Capacity to Administer a Federal Grant: LIFT's programmatic and fiscal oversight is managed by the organization's National Office. Like other AmeriCorps grantees such as City Year, LIFT has retained a single 501(c)3 status. LIFT's procedures for overseeing local multi-site operations have been well established because of its 12 year of history managing multi-state projects and federal grants (3 CNCS grants, 5 Department of Labor grants 1 Department of Education grant). LIFT has the necessary internal controls and separation of duties to protect the integrity of its financial systems. LIFT has received both standard and federal A-133 audits since FY02, which have been clean with unqualified opinion and no reportable conditions. The Board Audit Committee meets quarterly to review the audited financial statements and assess audit compliance. LIFT's auditors also conduct compliance assessments each quarter. LIFT's fiscal operations are managed by its COO and eCratchit, a provider of outsourced bookkeeping and accounting solutions. LIFT retains central controls on all expenditures. All financial transactions run through national, ensuring that expenditures comply with documentation and coding requirements. Local expenditures are first approved by the appropriate ED, then by the CFO, and finally by the COO who signs every financial transaction.

Board of Directors, Administrators, Staff: LIFT is guided by a 17-member Board of Directors, which meets quarterly; board committees (Audit and Finance, Diversity and Inclusion, Governance) conduct regular meetings in the interim. LIFT's CEO and co-founder, Kirsten Lodal, oversees an executive team, which includes the CFO, the COO, and Chief Development and Marketing Officer (CDMO). The COO oversees LIFT's Regional EDs as well as two national program managers dedicated to program refinement. The CDMO oversees three development managers and a two member communication team as well as consults the EDs on their fundraising plans. LIFT has a Director of Operations who oversees an Operations Associate and manages all operational matters.

B. Sustainability:

Over the last decade, LIFT significantly decreased its reliance on federal funds. In 2002, 70% of LIFT's budget was federally funded (VISTA and other grants); today, 6% of LIFT's budget is federally funded through its AmeriCorps National Direct grant. In its 2010 National Direct grant, LIFT opted into a Fixed Amount grant pilot. Since 2007, LIFT has had great success in demonstrating growth and sustainability, growing revenue annually by 20%-40% in each year. Last year, LIFT raised \$3.5

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million in cash revenue while also raising over \$2 million in multi-year pledges, a critical indicator of long-term sustainability. 6 months into this current fiscal year LIFT has secured \$2.2 million - over 60% of what was raised last year in 12 months. During the grant period, LIFT will execute a development plan that focuses on expanding its major donor program, upgrading fundraising events, securing corporate sponsors, obtaining major foundation support, and building more local funding relationships. Local funding, in-kind support, and volunteer engagement demonstrate community investment in LIFT; it is another crucial barometer of sustainability past the grant period. All of LIFT's local sites receive local financial and in-kind contributions and this year more than 70% of LIFT's revenue and in-kind contributions will come through regional development efforts. Common types of in-kind support include: office space, supplies, telephones, internet, computers, volunteer time/effort, and printing. The EDs ensure their regions build a base of community support. In some cases, city governments contract with LIFT. LIFT has received 3 grants from the Mayor's Office on Latino Affairs in D.C. to support its site which serves a Spanish-speaking population. LIFT also serves as a lead partner for Boston's Circle of Promise initiative; this partnership enabled LIFT to secure in-kind office space from the city. LIFT's sustainability also rests on its ability to generate an engaged volunteer base. Beyond their direct service, LIFT volunteers participate in the "Why I LIFT" program to share their LIFT experience with the community, raising \$10,743 in 2011 through the power of storytelling. LIFT volunteers make long-term commitments to the organization; each region is staffed by 50-100 volunteers who each serve 5-30 hours per week, over a 4-12 month period, supporting low-income community members. LIFT volunteers are committed to LIFT's mission; their dedication will help sustain LIFT's work in the community after the AmeriCorps grant ends. LIFT's model relies on support from community stakeholders. LIFT creates reciprocal partnerships with social service organizations, receiving thousands of client referrals every year from community partners (housing providers, education programs) who cannot serve families due to eligibility guidelines or scarce resources. Through its holistic services, LIFT fills a gap in local social service system. LIFT's role as a "community capacity builder" garners financial and in-kind investment from local leaders and program and ensures its long-term sustainability. LIFT also invests time in developing relationships with community leaders, who come together on LIFT's Regional Advisory Boards. Board members act as strategy and fundraising partners for the ED, activating their networks to build the local base of support. The EDs manage their boards with an eye towards local sustainability and stakeholder support.

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C. Compliance and Accountability:

During the last full year of LIFT's AmeriCorps grant, there were no compliance issues or areas of weakness raised by LIFT or CNCS. In fact, LIFT has never been cited for a compliance issue in our partnership with National Direct. LIFT is highly committed to ensuring that its AmeriCorps program is compliant with CNCS guidance. LIFT has a highly structured staff and management protocol which ensures we can detect and prevent compliance issues. The COO has a weekly supervision calls with all EDs to discuss program efforts and monitor compliance. LIFT holds itself and its sites accountable to compliance requirements by bringing any issues to the immediate attention of our Program Officer and emphasizing the need for staff to confront compliance issues openly and expediently. LIFT ensures compliance with CFR2520.65 by training all staff and AC members on the regulations associated with holding an AmeriCorps position. All staff and AC members are required to sign a form confirming their full understanding of prohibited activities. LIFT's AC supervisors are regularly made aware of regulations around suspicious or prohibited activities. AC members and program staff receive training on this, as described in detail earlier, throughout the year. Member actions are directly monitored by their supervisors. Members also help Program Managers train volunteers in these regulations at the beginning of each volunteer session. LIFT conducts regular check-ins with its Program Officer to ensure member and program compliance.

Enrollment and Retention: LIFT's enrollment and retention rates speak to the effectiveness of member recruitment, supervision, and support. LIFT has a 100% member enrollment and retention rate over the first 2 years of this grant period and expects 100% member enrollment and retention in the final year of this grant period. Through a competitive recruitment process, many members find LIFT via means other than the www.myamericorps.gov portal. Upon accessing the portal, many candidates experience technical difficulty in accepting LIFT selection. In 2012, LIFT began utilizing nationally facilitated webinar trainings to ensure that members are able to navigate the application, acceptance, and exit interview processes within 30 days of start or exit. LIFT was 100% compliant on this during the grant period.

Consultation with State Commissions and Operating/Member Service Sites: LIFT emailed each commission the multi-state consultation form. Of those commissions that formally responded, they affirmed that LIFT met their requirements and successfully completed their consultation process. LIFT has developed a "prioritization scorecard" to evaluate service sites and ensure that they have

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adequate programmatic and financial capabilities. The key criteria areas of the scorecard are: extent of unmet need, scaling opportunities, fundraising potential, partner strength, leadership and talent base, and program implementation. The scorecard ensures that LIFT will incorporate the criteria required by the AmeriCorps regulation 45 CFR2522.475 and the special considerations found in 45 CFR2522.450. LIFT currently provides funding and program support to each of the proposed sites. Each site has a strong performance record with innovative and sustainable programs, effective leadership, and community involvement. Proposed operating sites including service locations for this grant are: LIFT-Boston: Roxbury, Somerville, LIFT-Chicago: Uptown, Pilsen, LIFT-Los Angeles: Magnolia Place, LIFT-New York: Bronx, LIFT-Philadelphia: North Philadelphia, West Philadelphia, LIFT-Washington, DC: Columbia Heights, Shaw, Anacostia.

Budget/Cost Effectiveness

A. Cost Effectiveness:

LIFT will opt into the Fixed-Amount grant program. Based on the costs of the AmeriCorp living allowance, healthcare, and criminal history checks, LIFT has budgeted \$512,000 to operate its AC program annually- with an organizational budget of \$7 million; we request \$12,350 per full-time MSY for this grant period, totaling \$370,500 for 30 MSYs. LIFT received a \$300,000 Fixed Amount Grant in 2010 for 24 MSYs. The new request for this grant is below the max cost per MSY and represents a decrease from LIFT's 2010 cost per MSY. This decrease demonstrates the cost effectiveness of LIFT's AC program and its success in securing non-federal resources to support its grantee share. LIFT has demonstrated its ability to provide services at a lower cost than the rest of the field. Because of LIFT's highly leveraged volunteer driven model, it costs LIFT only \$250 to serve a client for 1 year on the path to stability. The Department of Labor reimburses \$5,000 for each full-time job secured and it costs \$2,400 for Community Action Agencies to serve a family annually. LIFT is able to achieve similar outcomes at a far lower cost. LIFT's services provide an amazing return on the investment. For LIFT's work in New York, The Robin Hood Foundation calculated LIFT's return on investment at 1:20. \$100,000 invested=\$2 million in client outcomes. Last year, LIFT generated \$13.7 million in wage increases, tax refunds, public benefits, and housing assistance, providing a \$1,245 value per client. Research demonstrates that a \$1,000 increase in family income improves children's test scores by 2% in math and 3.5% in reading. By the end of the grant, LIFT expects to generate \$50 million for 30,000 clients. For performance measures, LIFT will provide employment services to 5,000 clients, securing 425 job placements. Many clients face employment barriers; we help them achieve intermediate outcomes (job readiness skills, resume creation, basic computer

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training) before they can secure jobs. LIFT will serve 350 veterans ensuring that at least 100 veterans achieve economic outcomes (housing, benefits) which improve their quality of life.

LIFT will obtain diverse non-federal resources to support AC program implementation and organizational sustainability. LIFT needs \$141,500 from non-CNCS sources on an annual basis to support direct AmeriCorps member costs (living allowance, health insurance, background checks) during the grant period. LIFT expects to raise \$5.5 million this year in revenue, which includes \$300,000 from CNCS for the 3rd year of LIFT's current AC grant. That \$300,000 in CNCS funding represents 6% of its operational budget in FY13. At the end of the grant period, LIFT's CNCS support will represent less than 4% of its budget. LIFT has many foundation, corporate, and individual donors that provide ongoing support for the organization. In FY12, LIFT raised \$3.56 million in cash revenue: 53% foundations/corporations, 34% individuals, 8% federal, 4% in-kind, 1% city. These numbers do not include \$1.5 million in in-kind support and \$2.4 million in multi-year pledges which were recorded in our FY12 audit. LIFT's FY12 Funders include: Individuals-\$1,220,736 with \$450,046 from Major Donors, \$122,924 from the Annual Fund, and \$635,726 from Events. Foundations/Corporations-\$1,545,909 includes the following grants: Bank of America-\$125,000, Goldhirsh Foundation-\$150,000 Robin Hood Foundation-\$100,000. Public-\$328,394 includes AmeriCorps-\$303,394, DC Mayor's Office on Latino Affairs-\$25,000. Multi-Year Gifts- \$2,334,002, includes the following pledges, Capital One-\$1,112,500, New Profit-\$1,000,000. LIFT is also executing a \$10 million growth capital campaign to support its 5-year plan, with \$7 million of its \$10 million goal (reflected in multiyear pledges listed above) already secured.

B. Budget Adequacy:

During LIFT's previous CNCS grants, we created clear, reasonable, and aligned budgets that enabled LIFT to support its program activities and achieve its desired outputs and outcomes linked to helping clients achieve stability. LIFT budgeted \$7 million to operate in FY14 (7/1/13-6/30/14), with \$512,000 in direct AC member costs. CNCS's share of the full LIFT budget will be \$370,500 (5%) and LIFT's share will be \$6,629,500. We determined CNCS's share by establishing the number of AC members (30) needed to recruit volunteers and provide direct service. LIFT will draw from the long-standing funders listed above and other established sources to support the implementation of LIFT's program during the grant. We will also identify new funding opportunities to build a diverse donor base; we will expand the major donor program, upgrade national and local events, secure corporate

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sponsors, obtain foundation support, and build more local funding relationships. Halfway through FY13, LIFT has already secured \$2.2 million in cash revenue - over 60% of the total raised last year. LIFT also obtained growth capital commitments of \$7 million for future years. This strong revenue performance demonstrates the adequacy of LIFT's budget and program design.

Evaluation Summary or Plan

As demonstrated in the Rational and Community need narrative, LIFT implemented a number of external and internal controls to evaluate its program and provide the evidence for its intervention. These controls include external scholarly research, quantitative assessments of client outcomes, and qualitative assessment of client, community, volunteer, staff, AC members, and CNCS feedback. The quantitative assessment shows that LIFT secured 2.5 major outcomes (jobs, housing) for every client engaged in a long-term relationship with an AC member or volunteer. LIFT generated \$13.7 million in wage increases, tax refunds, public benefits, and housing assistance for clients, providing a \$1,245 value for per client. External research provided further support for the intervention - demonstrating that a \$1,000 increase in family income from employment or government transfers can improve children's test scores by 2% in math and 3.5% in reading and increase children's educational attainment and adult earnings. During the grant period, LIFT solicited client feedback through surveys, testimonials, and feedback sessions. After completing a qualitative assessment of client feedback, LIFT found clients who achieved at least one major outcome, all reported explicit volunteer and AC member support on internal (self-confidence) and community (strong networks) dimensions of well-being. The impact of the client volunteer relationship on client's internal capabilities and community networks was reported in all feedback. LIFT solicited community feedback from its Regional Advisory Boards and community partners. The response was positive; LIFT received awards from its partners for its role in building community capacity. LIFT administers its volunteer survey twice a year; 83% of volunteers said their time with LIFT was a transformational experience. LIFT garnered AC member and staff feedback through surveys, weekly reports, and performance reviews. Over 90% of respondents said they believe that LIFT is a great place to work and serve. LIFT convened the staff semiannually to reflect on program performance and stakeholder feedback. LIFT's Diversity and Inclusion initiative was developed based on the feedback from these sessions. LIFT fostered a strong partnership with CNCS to ensure ongoing compliance and program improvement. LIFT participated in CNCS conferences and conducted check-ins with its Program Officer to discuss program challenges and member development. LIFT was lauded for enrolling and retaining 100% of its member and surpassing its performance measures during the grant.

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LIFT's plan to evaluate our 2013 AmeriCorps program is similar to the 2010 plan. We will measure qualitative feedback from clients, partners, volunteers, AC members, staff, and CNCS. We will utilize the reporting functions in Link to track goals, outputs, and economic outcomes (performance measures: job placement services, job placements and veterans served, veterans achieving outcomes) and affirm the effectiveness of the intervention. We will launch an innovative constituent voice system to measure client and volunteer feedback, analyzing the role internal capabilities and community networks play in sustaining economic gains. We will identify a 3rd party evaluator to work with LIFT to create a comprehensive evaluation framework. We plan to provide preliminary results from the 3rd party evaluation in our evaluation report in 2016.

Amendment Justification

N/A

Clarification Summary

N/A

Continuation Changes

N/A