

## Asset Support Center (ASC)

### Brief: County Asset Building Coalitions – Promising Practices from Across the Country

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#### I. Introduction

The asset-building movement has broadened in recent years, from a focus on targeted strategies (such as Individual Development Accounts/IDAs or financial education) led by individual agencies to collaborative, comprehensive approaches that include a mix of agencies – nonprofit, public and private – tackling a range of approaches to helping families achieve long-term financial security. In the past few years, comprehensive asset-building coalitions have appeared at the state, county, city and, more recently, neighborhood levels.

This brief focuses on promising examples of *county* asset-building coalitions and is designed to inform the work of emerging coalitions in the San Francisco Bay Area. The paper is a product of the Bay Area Asset Support Center (ASC), a capacity-building effort of San Francisco Bay Area foundations working in partnership with the asset-building field.<sup>1</sup> ASC is providing technical assistance to advance local initiatives, convening practitioners to share promising practices, expanding the base of support for public policy reforms and creating an online database of strategies underway across the region.

In response to requests for technical assistance from emerging Bay Area county asset-building coalitions, this paper explores examples from across the country, selected based on recommendations from local, state and national intermediaries.<sup>2</sup> The findings are the result of interviews with coalition leaders and a review of relevant coalition documents.

The following section provides an overview and rough characterization of the different examples. It is followed by a chart that summarizes the responses to questions posed by Bay Area coalitions, including:

- What is the background/history of the coalition's formation?
- What types of asset-building strategies is the coalition pursuing?
- Who are the coalition partners?
- How is the coalition structured – is the partnership structure formalized (MOUs, etc.)?
- How is the coalition staffed?
- What is the budget of the coalition?
- Who is responsible for fundraising?

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<sup>1</sup> For information on ASC, go to [www.assetpolicy.org/asc](http://www.assetpolicy.org/asc).

<sup>2</sup> Thank you to Jenna Churchman of Marin Prosperity Partners, who did earlier research on several of these initiatives, Abby Hughes Holsclaw and Heidi Goldberg of the National League of Cities, Jackie Lynn Coleman of the National Tax Coalition at the Center for Economic Progress, Mary Fairchild of the National Conference of State Legislatures and Jennifer Brooks of CFED.

- Are the partners referring families to one another? If so, is there a system in place to track referrals?
- Is the coalition collecting data, measuring outcomes and evaluating their work?
- Have certain champions been critical to the coalition's success?
- Is the coalition engaging the broader community?

## II. Promising Models of County Asset Building Coalitions

The following are promising examples of county asset-building coalitions from across the country that can inform the work of emerging Bay Area coalitions. Three primary criteria were used in their selection. The coalitions:

- Are working to provide asset-building opportunities and services for low-income residents across a county;
- Include nonprofit, public and private sector stakeholders as partners; and
- Are advancing a range of asset-building opportunities, as opposed to just one strategy.

For purposes of description, the examples are organized into three categories: 1) Multi-strategy, decentralized coalition; 2) Evolving strategy, decentralized coalition; and 3) Multi-strategy, centralized partnership.

**Multi-strategy, decentralized coalition:** *a county coalition coordinated by one of the coalition partner agencies, with different partners leading on different strategies.*

*Example: Pierce County Asset Building Coalition, Washington State*

The Pierce County Asset Building Coalition (PCABC) started in 2005 when State Representative Jeannie Darneille began to convene her constituents in Pierce County (home to the City of Tacoma) around the challenges that working families were facing to achieve economic security. The meetings soon grew to encompass a broad-based coalition of over 50 nonprofit, public and private sector leaders who began to formulate a countywide asset-building agenda. They invited asset-building leaders from across the country to a retreat where they learned about individual asset-building strategies (individual development accounts/IDAs, financial education, anti-predatory lending). After the meeting, they decided that what was needed for Pierce County was a comprehensive, collaborative approach to helping families move from poverty to long-term economic security, an approach that would tie together different strategies to create a continuum of opportunities for county residents.

Coalition members selected one of their member agencies, Associated Ministries, to coordinate their efforts because of the agency's flexible structure. The coalition's day-to-day affairs are now coordinated by a full-time staff person, based at the Associated Ministries. Her responsibilities include the development of workplans, coordinating fundraising, grant writing and other duties. She reports directly to the deputy director of Associated Ministries

and to the governing committee of the PCABC. The governing committee provides direction to PCABC and has decision-making power over the coalition's work.<sup>3</sup>

From the beginning, the coalition decided to pursue a comprehensive asset-building agenda including: EITC education, outreach and free tax preparation services; streamlined referrals to services and benefits programs; financial education classes; protection from predatory lending, fraud and consumer scams; improved access to mainstream banking services; and IDAs.

Working in collaboration with Representative Darneille, coalition leaders also saw the importance of advancing a public policy agenda that would expand opportunities for working families. They began educating state legislators about the importance of asset-building strategies and the need for state support for similar efforts across the state. In the 2005/06 legislative session, Representative Darneille introduced a bill to provide seed grants for asset-building work in other counties. The bill, which became law in June 2006, received an \$118,000 appropriation: \$40,000 for four seed grants for county coalitions (\$10,000 each); \$50,000 for EITC outreach and \$25,000 for administration. Representative Darneille also sponsored a bill to expand state support for IDAs: the Savings, Earnings, and Enabling Dreams (SEED) Act passed and received a \$1 million dollar appropriation. In the 2007-2009 budget biennium, the state appropriated an additional \$1.2 million for expanding and supporting the activities of local asset-building coalitions across the state and renewed its \$1 million commitment to IDA accounts; an additional \$600,000 was appropriated to support other statewide asset-building activities.<sup>4</sup>

As a result of their advocacy work, PCACB has received ongoing state support for staffing and IDAs, and PCABC has inspired and informed the work of similar coalitions across the state of Washington. The work is now supported by a statewide coalition, the Washington Asset Building Coalition (WABC), staffed by the Washington Department of Community, Trade and Economic Development.

#### *Seattle-King County Asset-Building Collaborative, Washington State*

The Seattle-King County Asset-Building Collaborative grew out of an opportunity, presented by the National League of Cities (NLC) in 2005 for cities to learn about asset-building work around the country. The City of Seattle applied to be part of the NLC initiative because city staff saw an opportunity to connect its disparate asset-building activities into a more coordinated effort. They put together a team of community-based organizations and city departments who were advancing asset-building strategies, and they started to strategize about how to coordinate the various building blocks of activities into a more strategic system that better connected families to services. They soon realized that there was interest and relevant activity underway in all of King County, so they formalized their effort as the Seattle-King County Asset-Building Collaborative.

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<sup>3</sup> While the board of directors of Associated Ministries has ultimate legal authority, they defer to the PCABC governance committee on oversight.

<sup>4</sup> Information provided in a series of memos and conversations with Mary Fairchild and Josh Lohmer of the National Conference of State Legislatures.

The collaborative started by doing an inventory of asset-building activity across the county and then developing an action plan that covered a broad continuum of asset-building activities. With technical assistance from NLC and other national intermediaries, they have since been implementing the action plan, including the following activities:

- The pilot project of the collaborative, *the Seattle Asset Building Initiative*, is designed to establish a prototype for a comprehensive asset-building system. It is focused on formerly homeless families who are moving into supportive housing and households in subsidized housing authority units who are near an income level that could require them to pay market rent (30 percent of income). The pilot, led by the Seattle Housing Authority, is testing how agencies can work together to provide a continuum of asset-building services to clients.
- The *Bank on Seattle-King County* is an initiative designed to offer financial products and services to unbanked and underbanked low-income people. Partners include the City of Seattle, the Federal Reserve of San Francisco, the Washington State Department of Financial Institutions, banks and credit unions, nonprofit and advocacy groups.
- The *Working Benefits Project* is working with employers and unions to offer public benefits and asset-building services, onsite, to lower-wage employees;
- *EITC/Free Tax Preparation* – United Way of King County runs the VITA/EITC campaign in the county, including 15 free tax preparation sites. The campaign is coordinated with PeoplePoint, a system developed by the City of Seattle that connects tax filers to a range of public benefits. The sites currently offer savings bonds to tax filers; alternative refund anticipation loans will be made available in the 2009 tax season.
- *Anti-discrimination workshops* – The Seattle Office for Civil Rights offers monthly workshops for asset-building staff of collaborative partner organizations to help them understand the various discrimination issues faced by their asset-building clients.
- *Foreclosure prevention* – The Seattle Foreclosure Prevention Program is providing a range of foreclosure prevention services to county residents including counseling, development of repayment plans and stabilization loans.
- *Policy advocacy* – In March 2008, the City of Seattle passed a working families credit (to take effect in 2009), which adds an additional 10% to the EITC refund of tax filers. The collaborative is exploring ways to connect these refunds to asset-building services.

The collaborative now includes over 50 organizations and about 25 banks and credit unions participating in different action teams, organized around the various elements of the action plan. The work is co-coordinated by the City of Seattle, Department of Human Services, and Washington Appleseed, which is supported by state resources. The collaborative structure includes a steering committee with a self-selected membership that meets monthly, a general membership that meets every four months and action teams that meet regularly and are focused on the major initiatives of the collaborative.

Staff members from the City of Seattle and Washington Appleseed coordinate the overall work of the collaborative, while partner agencies take the lead on specific initiatives, including fundraising and accepting/managing grants when project funds are received. While the steering committee provides overall guidance to the Collaborative, the action teams have leeway to take action without the approval of the steering committee.

**Evolving-strategy, decentralized coalition:** *a county coalition coordinated by one of the partner agencies that is expanding/has expanded from a focus on one strategy to a broader, multi-strategy, asset-building agenda.*

*Example: Louisville Asset Building Coalition, Kentucky*

The Louisville Asset Building Coalition was first formed in 2001, with a focus on maximizing the provision of free tax preparation services in order to capture EITC and other tax benefits for the low-income individuals, families and neighborhoods of Metro Louisville (Jefferson County). Over time, the coalition grew to include a broad-based group of nonprofit, public and private sector agencies, staffed by volunteers and coordinated by the Center for Women and Families, which served as the fiscal agent.

In 2005 and 2006, after years of successful tax campaigns, coalition members began to think about ways to expand their work to include a broader continuum of asset-building strategies. At the same time, they decided that Metro United Way would take over as fiscal agent for the coalition, and they hired an executive director to manage the growing agenda. Informed by a strategic planning process, the coalition decided to pursue a number of asset-building strategies including: an online directory of asset-building services available to low-income residents across the county; a Louisville Saves campaign, loosely based on the America Saves model; and, more recently, Savings Circles, to support individuals to work together to develop and pursue their savings goals.

The coalition includes an advisory board that acts as the board of directors.<sup>5</sup> The advisory board includes ten member organizations including the Mayor's Office, the Federal Reserve, the Annie E. Casey Foundation, the Urban League, Metro United Way and other coalition members. Advisory board members agree to three obligations: support the success of LABC; attend regular meetings of the advisory board; and commit to working on LABC-related activities, outside of the advisory board. Only advisory board members representing organizations with no conflict of interest in relation to the coalition's fundraising activities are allowed to serve. The general membership of LABC now includes over 100 organizations, with three active subcommittees and several committees that meet on an ad-hoc basis.

The LABC executive director coordinates the day-to-day work of the coalition and is responsible for fundraising. He is a contract employee of Metro United Way and supervises six full-time staff members. The executive director reports directly to the coalition's advisory board, while keeping Metro United Way apprised of the coalition's work.

*Note: Nationally, a growing number of city and county coalitions that started with a singular focus on tax preparation services are now broadening their efforts to include one or more additional asset-building strategies such as: financial education, IDAs, homeownership, anti-predatory lending or foreclosure prevention. For more information, visit the website of the National Tax Coalition at: [www.tax-coalition.org](http://www.tax-coalition.org).*

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<sup>5</sup> Legally, the board of directors of Metro United Way has oversight responsibilities as fiscal agent, but United Way respects the independence of the LABC advisory board.

**Multi-strategy, centralized partnership:** *an initiative led and managed by a single agency that is contracting with partner agencies to provide a broad range of asset-building services.*

*Example: United Way of Palm Beach County Prosperity Campaign, Florida*

The Prosperity Campaign is a countywide initiative, started in the spring of 2004, that has been conceptualized, implemented and led by the United Way of Palm Beach County. To achieve its goal of building the economic stability for families across the county, the campaign relies on a partnership of human service agencies, government agencies and volunteers to provide support and assistance to more than 10,000 families each year.

The campaign includes free tax preparation services through VITA/EITC sites, the provision of IDAs and the opening of “Prosperity Centers”—one stop centers that provide a range of asset-building services. Four Prosperity Centers are located in sites across the county offering clients access to a full suite of asset-building services including: free tax preparation, credit counseling, financial education, money management and budget development, education and career counseling, first-time homebuyer education, micro-enterprise education and assistance, IDAs, public benefits planning, family support services and legal aid for seniors (provided at two of the centers).

United Way runs the campaign and contracts with service providers for the provision of specific services. United Way staffs the VITA sites and the IDA program. Management of the Prosperity Centers is contracted out. The campaign was initially funded through a three-year, \$3 million award from the Knight Foundation. Since the end of the grant period, United Way has sought alternative sources of funds to support their \$1.2 million annual budget.

The Campaign has received local and national awards and has served as a model to inform the United Way of America’s national initiative, *Innovative Partnerships for Financial Stability, Savings and Asset Building*. Other prosperity campaigns are now emerging – across the state of Florida, in Atlanta and other cities.

### **III. Responses to Structural Questions**

Appendix A summarizes answers to specific questions posed by Bay Area county coalition leaders.

## IV. Common Features and Success Factors

The following are observations and insights from coalition leaders and a review of coalition documents regarding common features and success factors that contribute to the work of county asset-building coalitions.

### Common Features:

➤ *Fundraising*

The coalitions are all pursuing funding for the administration of the coalition and/or for specific initiatives. Common/promising sources of funding include:

- Local and national foundations
- Public sector – city, county, state and federal funds
- Financial institutions
- United Way

➤ *Referrals*

Referrals among partner agencies tend to be informal, with the exception of the pilot project of the Seattle-King County Asset-Building Coalition, which is working to model a more formalized referral structure.

➤ *Evaluation*

Data collection, indicator tracking and outcomes measurement are a priority for all of the coalitions, but most are still working to develop systems to accurately measure progress in the different areas of asset-building work.<sup>6</sup>

### Success Factors:

➤ *Structure/Governance*

Interviewees highlighted several success factors that could be relevant to emerging Bay Area coalitions including the importance of:

- Paid staff to support and coordinate the work of the coalition;
- A clear organizational structure, developed early on in the planning process, that includes some type of governing body, a general membership and working committees; and
- A governing body comprised of coalition members with no conflict of interest in regards to fundraising for the work of the coalition.

➤ *Role of Champions*

Nonprofit leaders, mayors, city council members, state legislators, representatives from financial institutions and the Federal Reserve have all play the critical role of coalition champion, early in the planning process. These champions have helped to introduce the coalition to different sectors and to build its credibility. In some of the examples, one champion had a major impact—a mayor, a state legislator or a nonprofit leaders; in

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<sup>6</sup> The Seattle-King County Asset Building Collaborative is currently refining evaluation systems related to each of its project areas.

others, it was the power of several champions, working together, that helped to build credibility, visibility and support for the coalition.

#### **IV. Conclusion**

Comprehensive county asset-building coalitions represent a promising opportunity for organizations from the nonprofit, public and private sector to leverage their collective resources to strengthen and expand asset-building opportunities for county residents. The examples explored in this brief are only a sampling of work underway in counties across the country. Together, they offer a wealth of information and resources to inform the work of Bay Area coalitions.

## APPENDIX A – Responses to Structural Questions about County Asset Building Coalitions

	<b>Pierce County Asset Building Coalition</b>	<b>Seattle-King County Asset-Building Collaborative</b>	<b>Louisville Asset Building Coalition</b>	<b>United Way of Palm Beach County Prosperity Campaign</b>
<b>Description</b>	<ul style="list-style-type: none"> <li>- The Pierce County Asset Building Coalition (PCABC) is a collaboration of 50 partners working to actively engage all of Pierce County residents in building prosperity.</li> <li>- Partners support efforts to identify barriers to prosperity in Pierce County and help citizens protect and grow their assets.</li> </ul>	<ul style="list-style-type: none"> <li>- The Seattle-King County Asset Building Collaborative is a large consortium of public and private agencies working to ensure access to a continuum of comprehensive, effective services, to help low-income/working residents reach stability and security.”</li> <li>- The ABC is currently coordinating work on several asset-building initiatives including:               <ul style="list-style-type: none"> <li>- Seattle Asset Building Initiative</li> <li>- Bank on Seattle-King County</li> <li>- Worker Benefits Project</li> <li>- EITC/Free Tax Preparation</li> <li>- Anti-Discrimination Workshops</li> <li>- Foreclosure Prevention</li> <li>- Policy Advocacy/Working Families Credit</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>- Louisville Asset Building Coalition (LABC) is a broad-based collaborative effort dedicated to promoting financial stability for individuals and families. By providing both direct services and links to other community resources, the coalition strives to build an economic foundation that will allow members of the community to reach their highest potential. Through LABC, Louisville business, nonprofit and government representatives work side-by-side to help others build a successful future.</li> </ul>	<ul style="list-style-type: none"> <li>- United Way of Palm Beach County’s Prosperity Campaign is a nationally-recognized initiative with the goal of economic stability for families in community. To accomplish this goal, the Prosperity Campaign relies on a partnership of human service agencies, government agencies and volunteers to provide support and assistance to more than 10,000 families each year.</li> </ul>
<b>Background</b>	<ul style="list-style-type: none"> <li>- Started in 2005, with leadership by state legislator, Representative Jeannie Darneille, now includes 50 organizations</li> <li>- PCABC partners worked with Rep. Darneille to obtain state resources to support county coalitions across the state</li> <li>- PCABC been seen as model for other counties</li> <li>-Coalition members are active in the Washington Asset Building Coalition (WABC), staffed by Washington Department of Community, Trade and Economic Development</li> </ul>	<ul style="list-style-type: none"> <li>- Started in 2005, collaborative was initially catalyzed by opportunity presented by National League of Cities (NLC) to obtain technical assistance on asset-building work</li> <li>- City saw opportunity to connect disparate elements of asset-building services underway in city and county</li> <li>- Pulled together working team – which then evolved into Seattle-King County ABC; did inventory of services, developed action plan</li> <li>- NLC technical assistance in second year helped to implement action plan</li> </ul>	<ul style="list-style-type: none"> <li>- Started with focus on EITC/VITA, all volunteer</li> <li>- As grew, hired coordinator</li> <li>- Then decided needed to expand scope to include broader asset-building agenda</li> <li>- New executive director and strategic planning process</li> <li>- Saw need to map continuum to figure out full array of options for low-income working families</li> <li>- Led to development of additional strategies (see below)</li> </ul>	<ul style="list-style-type: none"> <li>- Started in the spring of 2004 with the opening of VITA sites, staffed by volunteers who were trained and certified by the IRS, and Prosperity Centers, a one-stop source of asset-building services.</li> </ul>

<p><b>Asset Building Strategies</b></p>	<p>Pursuing comprehensive list of strategies including:</p> <ul style="list-style-type: none"> <li>- EITC outreach/education</li> <li>- Free tax preparation</li> <li>- Streamlined referrals to other services and benefit programs</li> <li>- Financial education classes</li> <li>- Protection from predatory lending, fraud, consumer scams</li> <li>- Improved access to mainstream banking services</li> <li>- Individual Development Accounts (IDAs)</li> </ul>	<p>Collaborative partners are working together to connect residents to a range of services including:</p> <ul style="list-style-type: none"> <li>- Access to financial mainstream products and services</li> <li>- Public benefits</li> <li>- Homeownership opportunities</li> <li>- Access to IDAs</li> <li>- Financial literacy</li> <li>- Credit repair</li> <li>- Education and training</li> <li>- Other services designed to move individuals to economic self-sufficiency</li> </ul>	<p>Started with focus on VITA/EITC then expanded to include:</p> <ul style="list-style-type: none"> <li>- Directory of resources</li> <li>- Louisville Saves Campaign</li> <li>- Savings Circles</li> <li>- Expansion of VITA/EITC sites</li> <li>- Creating new banking products</li> <li>- Connection and support of collaborative programs in:                             <ul style="list-style-type: none"> <li>o Credit</li> <li>o Micro-lending</li> <li>o IDAs</li> <li>o TANF</li> <li>o Food Stamps</li> <li>o Housing</li> <li>o Financial Education</li> <li>o Workforce</li> </ul> </li> </ul>	<p>Campaign includes four Prosperity Centers, located throughout the county, where clients can access a portfolio of asset-building services including:</p> <ul style="list-style-type: none"> <li>- Free tax preparation services</li> <li>- Credit counseling</li> <li>- Financial literacy</li> <li>- Money management</li> <li>- Budget development</li> <li>- Education and career counseling</li> <li>- First-time homebuyer education</li> <li>- Microenterprise education and assistance</li> <li>- IDAs</li> <li>- Public benefits planning</li> <li>- Family support services</li> <li>- Legal aid for seniors</li> </ul>
<p><b>Partners</b></p>	<p>50 partner agencies including:</p> <ul style="list-style-type: none"> <li>- Municipal and county governmental agencies</li> <li>- Non-profit and faith-based social service agencies</li> <li>- Banking and educational institutions and</li> <li>- Foundations</li> </ul>	<p>50 partner agencies plus 25 banks and credit unions</p>	<ul style="list-style-type: none"> <li>- 100 partners in the public, private and nonprofit sectors</li> <li>- Founding partners: Metro United Way, IRS, Annie E. Casey Foundation, Making Connections Louisville</li> </ul>	<ul style="list-style-type: none"> <li>- The campaign is led by United Way of Palm Beach County</li> <li>- Services are providing through contractual agreements with partner agencies</li> <li>- Partners provide full-time, dedicated staff</li> </ul>

<p><b>General Structure</b></p>	<ul style="list-style-type: none"> <li>- PCABC governance group provides direction and has control over decision making; meets monthly; working on formalizing PCABC structure</li> <li>- General membership meets quarterly</li> <li>- Ad hoc committees focus on specific strategy areas</li> </ul>	<ul style="list-style-type: none"> <li>- Monthly steering committee meetings; members self select; open and informal</li> <li>- Quarterly general membership meetings three times per year; mostly about information sharing and learning</li> <li>- Action teams focused on major initiatives; most of work takes place in action teams</li> </ul>	<ul style="list-style-type: none"> <li>- Advisory Board acts as board of directors for LABC; comprised of representatives from 10 organizations (Mayor’s Office, Annie E. Casey Foundation staff, Federal Reserve staff, Urban League, etc.)</li> <li>- General membership includes 100 organizations</li> <li>- 3 active subcommittees; the rest meet on an ad hoc basis</li> </ul>	<ul style="list-style-type: none"> <li>- Campaign is led and managed by United Way of Palm Beach County</li> <li>- Partners meet on a quarterly basis.</li> </ul>
<p><b>Formalization of Membership Structure</b></p>	<ul style="list-style-type: none"> <li>- Partnerships informal at first</li> <li>- As PCABC started raising funds, developed memorandum of understanding (MOU) with partners who were performing services</li> </ul>	<ul style="list-style-type: none"> <li>- To date, structure has been relatively informal, except in the case of an organization providing a service related to a specific ABC initiative, which are governed by MOUs</li> </ul>	<ul style="list-style-type: none"> <li>- Advisory board members agree to three obligations: to support the success of LABC; regular meeting attendance; working on something related to LABC, outside of advisory board</li> <li>- No MOUs among advisory board or general members</li> </ul>	<ul style="list-style-type: none"> <li>- Contracts between partners and United Way for service provision</li> </ul>
<p><b>Staffing</b></p>	<ul style="list-style-type: none"> <li>- One full-time staff person acts as coalition coordinator</li> <li>- Associated Ministries is employer and provides overhead/administration</li> <li>- Role of staff person is to coordinate work of coalition, develop work plans, write grants, coordinate fundraising</li> <li>- Reports to deputy director of Associated Ministries and to governing committee of PCABC</li> </ul>	<ul style="list-style-type: none"> <li>- City of Seattle, Department of Human Services providing leadership/coordination</li> <li>- Washington Appleseed houses part-time staff who is co-coordinating with the City, supported by grant from Washington Department of Community, Trade and Economic Development (CTED)</li> </ul>	<ul style="list-style-type: none"> <li>- Partner organization, Center for Women and Families, was fiscal agent/provided staffing until recently</li> <li>- Now Metro United Way is fiscal agent.</li> <li>- Executive Director is contracted with Metro United Way; works independently as LABC lead, reporting to advisory committee, but keeps United Way informed of activities</li> <li>- Six staff supporting LABC, all housed at Metro United Way and reporting to executive director</li> </ul>	<ul style="list-style-type: none"> <li>- United Way staffs the VITA sites and the IDA program</li> <li>- Prosperity Centers are managed under contract with United Way.</li> <li>- All other services contracted out</li> </ul>

<b>Budget – Sources of Funding</b>	<ul style="list-style-type: none"> <li>- Current budget: \$250,000</li> <li>- Sources: Foundations, private sector, Washington State, financial institutions</li> </ul>	<ul style="list-style-type: none"> <li>- To date, overall effort has been supported primarily by voluntary staff and other contributions from partners</li> <li>- Washington State funds supporting staff at Washington Appleseed</li> <li>- Fundraising underway for individual projects</li> <li>- Other sources of funds, to date: United Way, foundations</li> </ul>	<ul style="list-style-type: none"> <li>- Current budget: \$250,000, not including value of in-kind support; if include in-kind budget, is about \$500K</li> <li>- Sources: Foundations, financial institutions, US Conference of Mayors, public funds, United Way</li> </ul>	<ul style="list-style-type: none"> <li>- Current budget: 1.2 million budget, of which 400-500K from United Way</li> <li>- Other sources: foundations, banks, county discretionary funds</li> </ul>
<b>Fundraising Responsibility</b>	<ul style="list-style-type: none"> <li>- Governing committee developed workplan for fundraising proposals</li> <li>- Staff responsible for writing grants</li> </ul>	<ul style="list-style-type: none"> <li>- Partners lead on different initiatives</li> <li>- Lead organization takes responsibility for fundraising, receiving and managing grants</li> </ul>	<ul style="list-style-type: none"> <li>- Executive director has primary responsibility for fundraising</li> </ul>	<ul style="list-style-type: none"> <li>- United Way does all fundraising</li> </ul>
<b>Referral System Among Partners</b>	<ul style="list-style-type: none"> <li>- Referrals between partner agencies</li> </ul>	<ul style="list-style-type: none"> <li>- Pilot/Seattle Asset Building Initiative is developing replicable prototype of how to connect clients to range of services; includes extensive referrals among participating agencies and housing authorities (6 agencies provide case managers; 20 agencies providing services as part of pilot)</li> </ul>	<ul style="list-style-type: none"> <li>- Working on expanding range of referrals among partner agencies</li> </ul>	
<b>Data Collection, Outcomes Tracking and Evaluation</b>	<ul style="list-style-type: none"> <li>- Collecting data related to tax preparation/filing</li> <li>- Data collection systems under development for other strategies</li> </ul>	<ul style="list-style-type: none"> <li>- Working on gathering data, tracking outcomes in each area</li> <li>- Developing different indicators; tracking different outcomes in each area (e.g. Seattle Asset Building Initiative using Pangea Software; Brookings helping to develop tracking system for unbanked initiative)</li> </ul>	<ul style="list-style-type: none"> <li>- Some data gathering/tracking underway; LABC supporting, not leading</li> </ul>	<ul style="list-style-type: none"> <li>- Campaign does not yet have a system in place for data collection; participating in data-gathering pilot with United Way of America to develop measurable outcomes for financial stability.</li> <li>- Strategy is to bring someone in to do data collection</li> </ul>

<p><b>Champions</b></p>	<ul style="list-style-type: none"> <li>- Strong champions at the state and local level have been key to the coalition’s success.</li> <li>- Champions have included state representatives and leaders from nonprofits and churches</li> </ul>	<ul style="list-style-type: none"> <li>- Support from state legislators, resulting in state funding, has been critical</li> <li>- Mayor of Seattle and city council member have been important champions</li> <li>- Support/leadership/contributions from partners have been key</li> </ul>	<ul style="list-style-type: none"> <li>- No one champion; everyone has worked together to leverage contacts</li> </ul>	<ul style="list-style-type: none"> <li>- Executive Vice President of United Way of Palm Beach has been primary champion for campaign</li> </ul>
<p><b>Community Engagement</b></p>	<ul style="list-style-type: none"> <li>- Town hall meeting in Fall 2006 focused on debt; Fall 2008 town hall to focus on foreclosure prevention</li> </ul>	<ul style="list-style-type: none"> <li>- Community organizations involved, like ACORN, who are connecting to residents</li> <li>- Education events</li> <li>- Focus groups</li> </ul>	<ul style="list-style-type: none"> <li>- Reaching residents through direct mailing and working through partners</li> <li>- Less directly engaged with community because see it as more important that community interact with partners (for example, last year LABC did a financial festival that highlighted work of partners, as opposed to work of LABC)</li> </ul>	

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