

investment summary

Making Connections Oakland

For nearly a decade, the Annie E. Casey Foundation has worked with a broad range of partners in Oakland to demonstrate through the *Making Connections* initiative that when families are strong, outcomes for even the most disadvantaged children will substantially improve.

SEPTEMBER 2009

Our work in Oakland and in other sites across the country seeks to help:

- *Families work, earn, and save their way toward self-sufficiency; and*
- *Ensure that their children are healthy, prepared to succeed in school, and read proficiently by the end of third grade.*

These goals advance a “two-generation” approach—promoting economic success and simultaneously ensuring that children get a good start in life. Casey’s investments in Oakland have demonstrated how these results can be achieved by building communities’ capacity to connect families to economic opportunities, strong social networks, and effective services and supports.

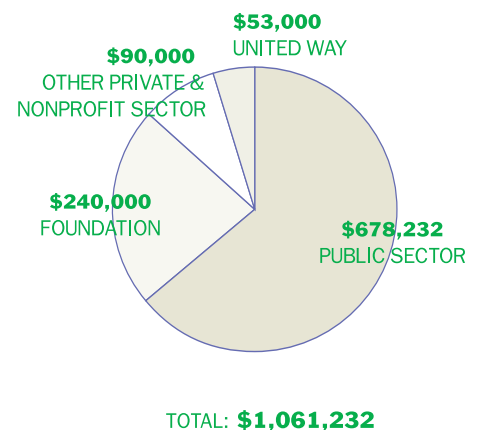
For 2009–11, Oakland will deepen work with a committed coalition of partners to connect more families in Lower San Antonio—a diverse, vibrant, and historically underserved neighborhood—to proven pathways for success both in the early grades

of school and in securing savings, affordable housing, and financial literacy. In addition, *Making Connections* will continue work to expand opportunities for civic engagement and leadership by working with partners committed to the Lower San Antonio neighborhood.

A PLATFORM FOR SUCCESS

During the past decade, *Making Connections* Oakland has mobilized a strong array of partners to strengthen multilingual, low-income children and families living in the Lower San Antonio (LSA) neighborhood. The Haas Jr. Fund, Bay Area LISC, East Bay Asian Youth Center, Oakland Unified School District, Lao Family Community Development Corporation, United Way of the Bay Area, East Bay Community Foundation, city government, and others have worked with *Making Connections* to achieve the following milestones:

CO-INVESTMENT IN MAKING CONNECTIONS OAKLAND 2008



• ***Increasing the supply of affordable housing for low-income families.*** Skyrocketing housing prices in the Bay Area during the past decade have threatened to dislocate working poor families in Lower San Antonio, many of whom pay up to half of their monthly incomes on rent or mortgage. Starting with a seed grant in 2002 to help Lao Family Community Development start the Multilingual Homeownership Center and continuing with the 2005 launch of the Lower San Antonio Real Estate Council, *Making Connections* Oakland has helped nonprofit organizations and developers—including East Bay Asian Local Development Corporation, Affording Housing Associates, Resources for Community Development, and Bridge Housing—coordinate their work, pool resources, and substantially increase affordable housing in the community. A \$2 million Program Related Investment from the Casey Foundation helped start the Lower San Antonio Community Loan Fund, which has leveraged an additional \$8 million from investors such as the Northern California Community Loan Fund, Bay Area LISC, San Francisco Foundation, and the Haas Jr. Fund. The loan fund is helping create close to 400 units of affordable housing in Lower San Antonio, and the Real Estate Council has been recognized as one of the most successful in the country.

• ***Creating broad-based community support for helping families build and protect assets.*** *Making Connections* Oakland helped alert local leaders to wide disparities in the availability of mainstream financial products and services between Lower San Antonio and the city and county. In 2004, only 45 percent of LSA households with children had a savings account, compared to 71 percent in the city overall. To close that gap, the initiative launched the *Savings Pathway*, which brought together the Centro Legal De La Raza, East Bay Asian Local Development Corporation, Lao Family Community Development, the Unity Council, the San Antonio Neighborhood Network (SANN), and the San Antonio Community Development Corporation to strengthen families' financial security. An early adopter of the Foundation's asset pathway model, the *Savings Pathway* partnership has focused on increasing access to and use of mainstream banking products—savings and checking accounts, affordable remittances, and debit

cards—as well as on providing financial education and coaching to help residents repair credit, access affordable housing, and avoid predatory lenders and foreclosure. Since 2006, more than 1,300 families have received financial coaching from *Savings Pathway* and other partners. In addition, *Savings Pathway* partners help families combine the Earned Income Tax Credit, Food Stamps, child care subsidies, and other benefits to supplement their incomes. These efforts have influenced the development of other initiatives to help families build assets, including Bank On Oakland, the Alameda County Community Assets Network, and the Earn It, Keep It, Save It EITC campaign coalition, led by the United Way of the Bay Area. In 2009, the campaign operated 34 free tax preparation sites in Alameda County, returning \$12.8 million to more than 12,000 households.

• ***Spurring community action to assure children are healthy and prepared to succeed in school.*** In response to high rates of student mobility and English language learners, *Making Connections* has engaged schools, parents, community-based organizations, advocates, and others in developing a continuum of culturally appropriate, accessible early education, school readiness, and early literacy supports. These include Play and Learn Groups structured to help families with limited access to formal preschool help their children acquire language and social skills, and which—through a partnership with the Oakland Parks and Recreation Department—now serve more than 300 families. *Making Connections* also has worked to expand preschool opportunities for children and parents at Garfield Elementary—the focus school for early grade success strategies—through literacy-enriched pre-kindergarten summer camps and before- and after-school reading programs. In addition, the initiative worked with the Oakland Unified School District to secure a \$600,000 Toyota Family Literacy Program grant to create the Garfield Family Learning Center, now a district model for engaging parents as first teachers and best advocates for their children.

• ***Connecting residents and families to leadership development and mutual support.*** Strategies such as the San Antonio Neighborhood Network provided hundreds of residents with the opportunity to increase their civic

participation and build leadership skills through community planning and surveys. For example, a SANN survey in 2007 helped identify large numbers of “unbanked” LSA families.

- **Developing local capacity to gather, analyze, and disseminate data for learning, evaluation, and accountability.** Early work by the Urban Strategies Council as the former Local Learning Partner for *Making Connections* Oakland has helped organizations such as the Community Development Institute (CDI), Lao Family Community Development, and other organizations to develop data management systems to track performance of result and capacity-building strategies. The CDI now supports data and learning activities for *Making Connections*' School and Family Economic Success result teams.

- **Increased co-investment.** For 2008, co-investment from local partners in *Making Connections* totaled more than \$1 million, including nearly \$700,000 from organizations such as the Oakland Fund for Children and Youth, the United Way of the Bay Area, First 5 Alameda County, local foundations, and the state department of education to assure children are healthy and prepared to succeed in school, and some \$364,000 in public and private funding to support asset building strategies.

A TRACK RECORD OF RESULTS

A platform of high-capacity, credible, and influential partners, supported by strong resident leadership, has translated early investments into better results for children and families:

Children Are Healthy and Prepared to Succeed in School

More LSA children are gaining quality preschool experiences. Since 2006, more than 1,200 children and their families have participated in Play and Learn Groups, attended family literacy activities, and completed summer pre-kindergarten programs. This includes nearly 500 children who have received one-on-one early literacy instruction in neighborhood Head Start and

PROMOTING SUCCESS IN EARLY GRADES: PRIORITY STRATEGIES FOR 2009–11

- **Increase participation in quality early care and preschool.** *Making Connections* Oakland's early grade success partners will connect more than 1,050 children and families to quality early learning opportunities by 2010 through Play and Learn Groups, Early Childhood Education Family Centers, and one-on-one literacy instruction through the Jump Start program.
- **Increase third grade reading proficiency levels at the Garfield Elementary focus school to 43 percent by 2009–2010 school year and to 55 percent by 2010–2011 school year.** Working with the school district and Garfield Elementary, more than 530 children in grades K-3 will be enrolled in literacy and academic enrichment programs to increase reading proficiency levels. This strategy will be supported through expanded pre-kindergarten camps that will serve some 150 children entering Garfield Elementary, and by engaging parents in family literacy, parent education, and ESL classes through Family Resource Centers.
- **Reduce chronic absenteeism at Garfield Elementary.** Strategies to assure all children in grades K-4 at Garfield Elementary are enrolled in health insurance, have a medical home, and receive developmental screenings and follow-up services will cut the percentage of students missing more than 20 days of school from 7 percent currently to 5 percent in 2010. In addition, *Making Connections* is working with the school district to address chronic absence at Garfield and nine other elementary schools through improved attendance tracking systems.

PROMOTING FAMILY ASSET DEVELOPMENT: PRIORITY STRATEGIES FOR 2009-11

- *Expand the Savings Pathway.* *Making Connections* will work with *Pathway* partners to connect an additional 400 LSA residents to a savings or IDA account by 2010. In addition, nearly 700 families will be enrolled in financial education and coaching programs, and more than 900 families will be screened for eligibility for Food Stamp and other benefits. The VITA campaign has set a target of returning more than \$1.6 million in EITC refunds to the community in 2010.
- *Continue to increase the supply of affordable housing in Lower San Antonio.* In partnership with the Real Estate Council and the LSA Community Loan Fund, *Making Connections* will seek to complete an additional 250 units of affordable housing by 2010.

child care centers through the San Francisco-based Jumpstart in 5 program.

More students at the Garfield Elementary focus school are reading proficiently in third grade. In 2008, 33 percent of Garfield third graders scored proficient in reading, compared to just 10 percent in 2005.

RESULT	2006	2007	2008
Garfield Elementary School children reading proficiently in 3rd grade	17%	26%	33%

More Families Have Increased Levels of Assets

More LSA residents are opening savings accounts and Individual Development Accounts. Since 2006, more than 400 residents have opened a savings or IDA account through *Making Connections' Savings Pathway* partners.

More affordable housing is available. In partnership with the Real Estate Council, and through the LSA Community Loan Fund, more than 130 units of affordable housing have been created since 2006. And another 250 units are in predevelopment or development.

More LSA residents are getting the EITC. In 2009, the four free tax preparation VITA sites serving Lower San Antonio returned \$1.1 million in EITC refunds to the community.

SEIZING OPPORTUNITIES TO BUILD FOR THE FUTURE

Strong partnerships built during the past decade with Bay Area LISC, the United Way, Haas Jr. Fund, community-based organizations, city government, and the school district have positioned *Making Connections* Oakland to scale up and sustain strategies that will lead to more children succeeding in school and more families achieving financial stability. LISC will soon begin to convene key partners toward connecting additional families in the region to the EITC, affordable housing, and financial education and coaching. And it is working with *Making Connections* to expand the interventions that have doubled third grade reading proficiency rates at Garfield Elementary—expanded early learning, kindergarten transition, family engagement, and individualized literacy instruction—across the Oakland Unified School District. Given the impact and influence of this work, *Making Connections* also is prepared to push aggressively for wider replication, given both the recession and California's budget crisis, which have placed a premium on proven strategies to help vulnerable families succeed.