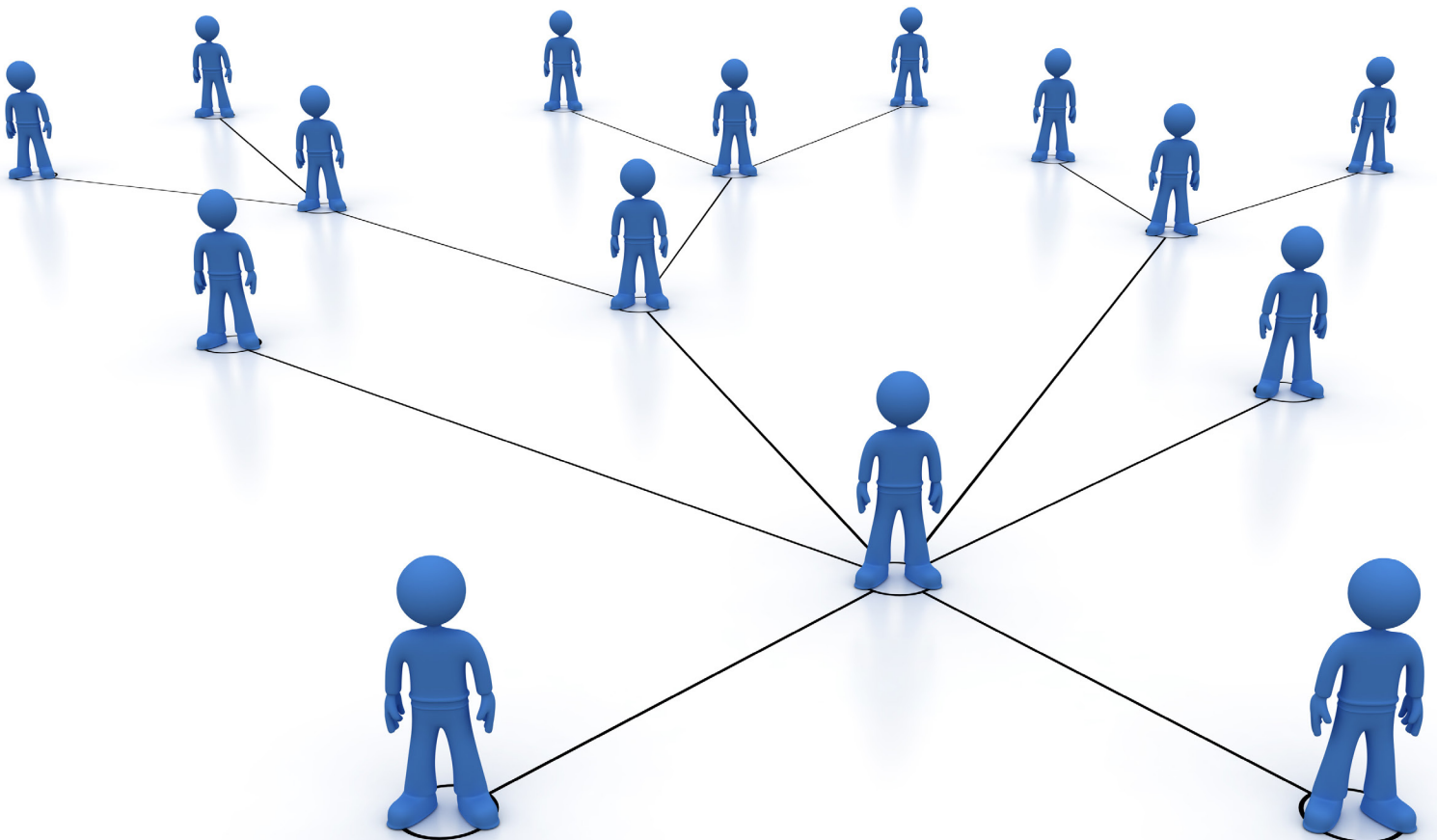# SIEMER INSTITUTE

2017 Network Impact Report

Executive Summary

The Siemer Institute funds programs in more than 50 communities across the US that prevent family homelessness and reduce school instability. Siemer Institute supported programs improve financial stability, housing stability, and school stability for low-income families with school-age children. In 2017, the Siemer Institute's network of funded programs served **more than 8,700 families and more than 20,000 children**. More than 15,000 of those children were school-age children. This represents a 51% increase in the number of families and a 62% increase in the number of children served compared to 2014.

Families working with Siemer Institute partners experienced tangible improvements in their stability and well-being. Siemer Institute partners helped **6,504 families obtain or maintain safe and stable housing**, and their supports enabled **4,033 families to meaningfully increase their incomes**. Despite the challenges that participants face, **8,568 families with school-age children (98% of families served) remained in their school of origin** or they were supported through their moves to other schools.

Our partners achieve these successes by providing a core set of services including case management and financial assistance to keep families in their homes and then help them move toward a stable future. Our partners vary in their program type, key services, major challenges, and enhancements they plan to make in the future. However, the families served by our network are generally: low-income, need additional skills to improve their employment opportunities, need greater access to decent affordable housing, and can benefit from improving their financial management skills. Those families are also resourceful and committed to engaging in this process, even though it is often demanding and time-intensive.

Introduction

The Siemer Institute was founded by Al and Barbara Siemer in 2011 with the goal of preventing family homelessness and reducing school instability to give disadvantaged children greater opportunities to achieve academic success. Siemer Institute supported programs typically provide intensive case management, direct financial assistance, housing support, and other services to keep families in stable housing and to empower them to remain stable in the future. Most of our partners use a two-generation (or whole family) approach, addressing the needs and goals of all family members while strengthening the family unit.

This report summarizes the network's 2017 accomplishments, and it compares 2017 performance to prior years. The report also goes beyond the performance data to explore the key services, upcoming challenges, and future enhancements toward which our partners will strive in the next year.

Part 1: National Impact

Network Outputs

The Siemer Institute adopted a measurement framework in 2014, and since then our network's impact has grown substantially. As Table 1 and Figure 1 show below, Siemer Institute partners served **8,706 families** and **20,027 children** in 2017. Seventy-six percent of those children, **15,247, were school-age children**.[1] [2]

Siemer Institute Network Outputs: 2014-2017				
Output	**2014**	**2015**	**2016**	**2017**
New Families	3,857	5,318	5,204	4,974
Total Families	5,783	8,240	8,403	8,706
Children	11,562	16,922	19,061	20,027
School-Age Children	9,390	13,037	15,019	15,247
Completions	2,275	3,411	3,511	3,730
Dropouts	627	836	795	793

Looking at multi-year trends, we see that family stability services now reach more families and children than in prior years. In 2014, the Siemer Institute's network served 5,783 families, while in 2017 the network served 8,706 families – a 51% increase. This large increase in total families served was coupled with an even larger increase in children served. In 2014, our network was able to support 9,390 school-age children at

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[1] Families served is a count of the number of families that enroll in a Siemer Institute supported program and receives services for any duration of time during the calendar year. E.G. A family could have enrolled on our program on January 1, 2017 and they would be counted as a family served or they could have enrolled on December 31, 2017 and they would be counted as a family served.

[2] Children served is a count of the total number of children (ages 0-18) in the families that are served. Children may or may not received services directly from the program, however we count them because they benefit from the financial, housing, and school stability that our program supports. School-age children is a subset of all children served and it contains children who are roughly 5 to 18 years old.

risk of changing schools, while in 2017 the number of school-age children increased by 66% to 15,247 school-age children. During this time of growth, the program completion rate has increased slightly from 39% of all families served in 2014 to 43% of families served in 2017.[3] The dropout rate also declined slightly from 11% to 9% between 2014 and 2017.[4] The dropout and completion trends suggest that our partners are not sacrificing program effectiveness to serve a great number of families.

Figure 1:Trends in Outputs 2014-2017
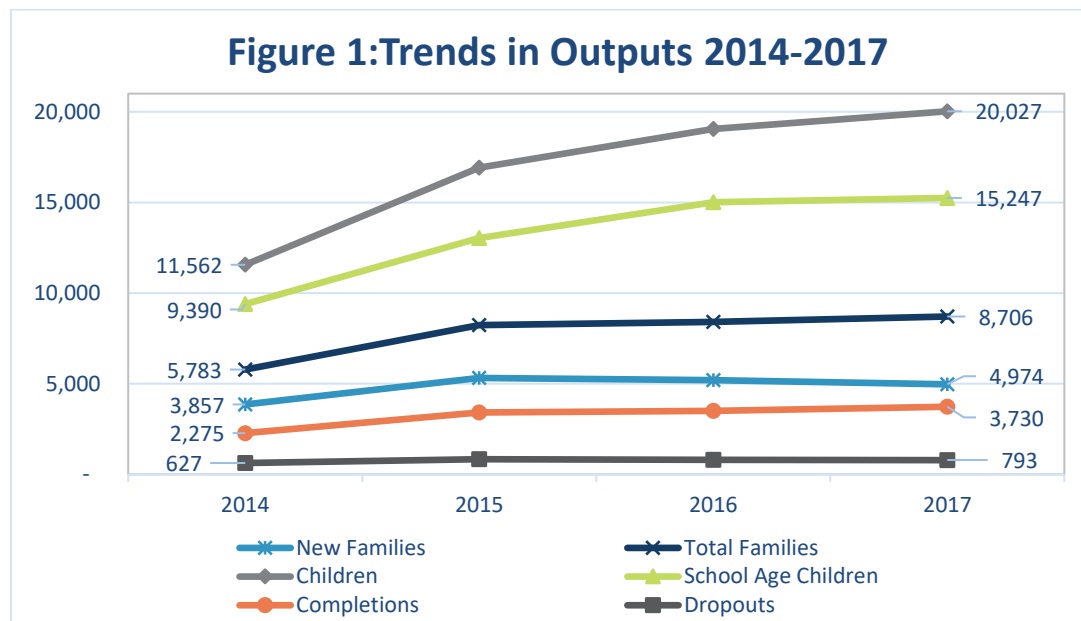
A large proportion of the growth in the number of families and children served occurred between 2014 and 2015. During that time, the Siemer Institute's network was still quickly expanding into new partner communities, and recently added partners were scaling up their efforts.[5] Table 2 below provides the changes in families in children served between 2014 and 2017. Nearly three-thousand **additional** families were served by the network in 2017 compared to 2014, and 84% of that growth occurred between 2014 and 2015. The remaining growth in families served occurred between 2015 and 2017. Similarly, about two-thirds of the growth in children and school-age children served occurred between 2014 and 2015, while the remaining one-third occurred between 2015 and 2017.

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[3] The definition of completion is locally determined based on local program design and target population. Analysis in the 2016 Evaluation Report found "no systematic differences in how programs defined completion" and their completion rates.

[4] Families that exit the program but fail to meet the locally determined definition of completion are considered dropouts.

[5] The Siemer Institute added 17 new partner communities in 2014. Only 2 of the 17 partners were added at the beginning of the year, while 12 of the 17 were added in the 2nd half of the year.

Table 2: Growth in Families and Children Served 2014 – 2017			
Output	Total Growth 2014 – 2017	% of Total Growth 2014-2015	% of Total Growth 2015-2017
Total Families	2,923	84%	16%
Children	8,465	63%	37%
School-Age Children	5,857	62%	38%

To explore further the influence of network expansion and organic growth (i.e. existing programs serving more families over time) occurring at each provider, Figure 2 depicts the average number of families and children served per service provider between 2014 and 2017. Starting with total families, we see that the average number of families served by each service provider increases over time. In 2014, service providers served an average of 77 families per year, and that number that rose substantially in 2015 to 97 families per year. In 2016, the average number of families inched upward to 98 per year, and then it rose sharply again in 2017 to 109 families per year. This growth over time indicates that Siemer Institute partners have increased their capacity to serve families.
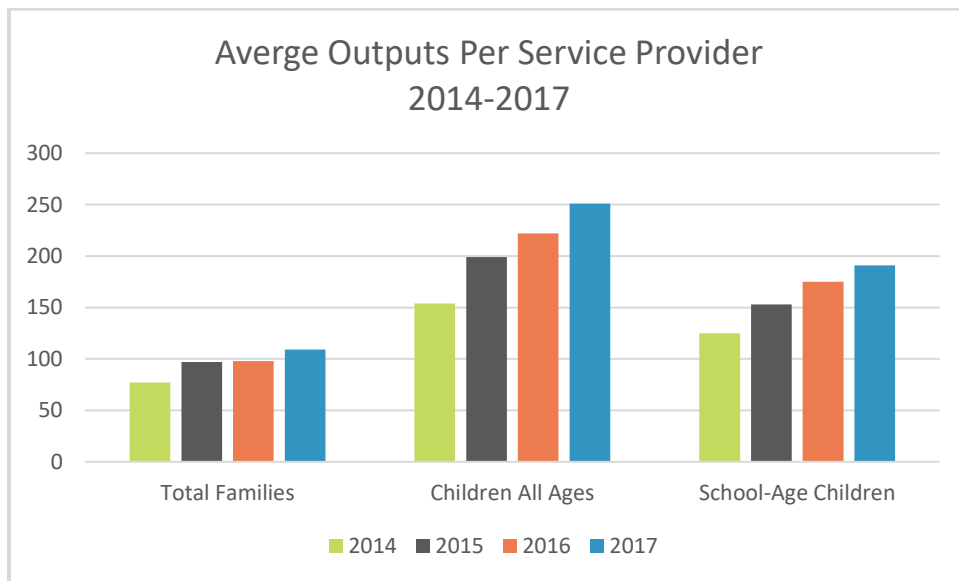

Figure 2 also depicts a substantial increase in the average number of children and school-age children served by service providers annually. The growth in children per service provider has outpaced the growth in families per service provider. This was particularly true in 2015-2016, when the number of families per service provider increased by 1% but the number of children per service provider increased by 11.5 percent.

The Siemer Institute's impact has grown substantially since 2014, when we first adopted our shared measurement framework, with the network now serving 8,700 families annually with 15,000 school-age children. Most of that growth can be attributed to the Siemer Institute developing new partnerships and opening new sites across the country. Partner organizations have also increased the number of families they serve each year, on average, and that growth provides an additional boost to network's impact.

Network Outcomes

Serving more families and children each year is an important achievement, but the work must continue to be effective for that expansion to result in stronger families and stronger communities. Table 3 and Figure 3 depict four-year trends in the Siemer Institute core outcomes. Core outcomes are collected by all Siemer Institute partners for all the families served by the program, so they provide the best data by which to understand the network's effectiveness over time.[6]

As Table 3 shows, in 2017 **4,033 families increased income to more self-sufficient level** - more than double the number in 2014.[7] There has been a similarly large increase in the number of families that have achieved stable housing. In 2014, 3,730 families achieved stable housing, while in 2017, **6,504 families achieved stable housing**, a 74 percent increase.[8] Table 3 also shows that the network is helping more families avoid disruptive school moves. In 2017, **8,568 families with school-age children were able to avoid disruptive school moves**.[9] Finally, the number of families experiencing planned moves has remained relatively stable over time. In 2017, **508 families experienced a planned move**.[10]

Table 3: Number of Core Outcomes Successes 2014-2017				
Outcome	**2014**	**2015**	**2016**	**2017**
Increase Income	1,918	2,765	3,313	4,033
Stable Housing	3,730	4,918	5,538	6,504
No Disruptive Moves	5,587	7,921	8,256	8,568
Planned Moves	494	693	610	508

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[6] The Siemer Institute also has 10 optional outcomes upon which partners may choose to report. Those optional outcomes are not analyzed in this report.

[7] The Increase Income outcome is defined as "*Families that move to a higher level on the income dimension of the Arizona Self-Sufficiency Matrix.*"
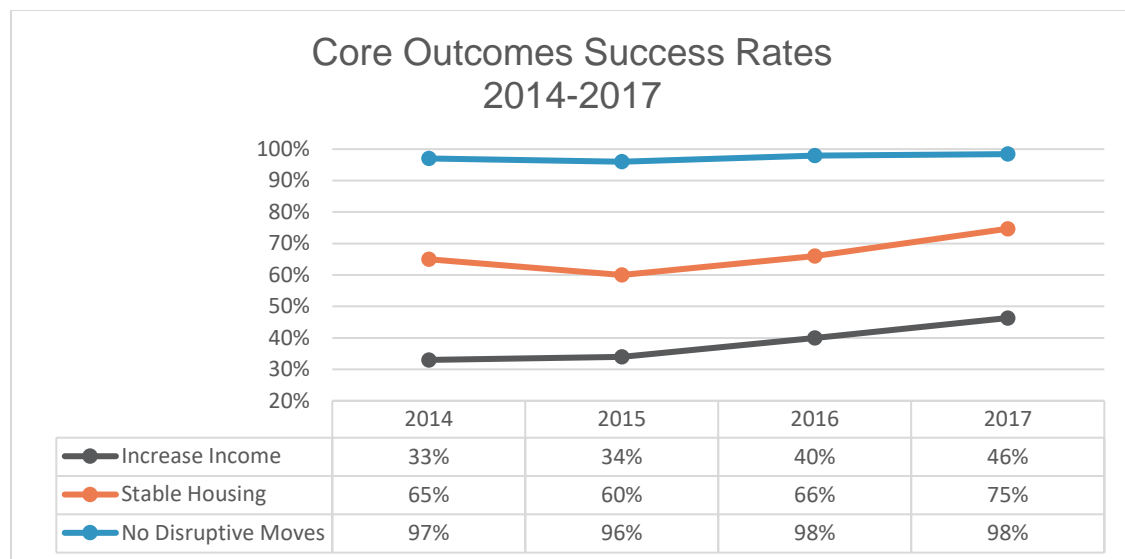
[8] The Stable Housing outcome is defined as "*Families that obtain or maintain appropriate, safe and stable housing (e.g., remain in the same housing or improve their housing situation by moving out a shelter, motel, or shared living situation, etc.*"

[9] Unplanned/Disruptive Moves are defined as "*Moves which indicate continued family instability. Service providers were not made aware of the move prior to taking place, nor were the schools given sufficient notice.*"

[10] Planned/Supported Moves are defined as "*Moves coordinated with the support of the service providers, and child is now in a school that is closer to the family's stable housing, will provide long term school stability, and/or better fits the child's academic or social needs.*"

Figure 3 below indicates success rates with the Siemer Institute's core outcomes have steadily improved over time. This improvement has enabled the Siemer Institute's network of partners to help more families achieve success as growth rates moderated in 2016 and 2017.[11]

In 2017, **98% of families were able to avoid a disruptive move that would cause them to change schools**. That success rate has been consistent since 2014. The other two core outcomes have lower success rates compared to the disruptive moves outcome, but they have demonstrated substantial improvement over time. Looking at stable housing, **75% of families in the program achieved stable housing** in 2017. This success rate is substantially higher than the success rates in 2016 (66%) and 2015 (60%).[12] Finally, looking at increasing income, we see that **46% of families were able to increase their incomes to a higher level**.[13] The success rate for this outcome has improved every year since 2014, when the success rate was 33 percent.

Core Outcomes Success Rates 2014-2017

	2014	2015	2016	2017
Increase Income	33%	34%	40%	46%
Stable Housing	65%	60%	66%	75%
No Disruptive Moves	97%	96%	98%	98%

Outcomes Summary

Since the Siemer Institute adopted the measurement framework in 2014, our partners have maintained a high rate of success preventing disruptive school moves. During that time, our partners have also substantially improved their ability to help families achieve housing stability and increase their incomes.

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[11] There is no success rate calculated for the Planned Moves core outcome. There is no ideal success rate associated with this outcome. Planned Moves indicate a family move that could lead to positive outcomes for the family. A target success rate cannot be established for this outcome; rather one must expect that programs provide support for every family that moves to minimize the frequency of disruptive moves.
[12] The Stable Housing outcome is defined as "Families that obtain or maintain appropriate, safe and stable housing." Local partners determine precisely how to define each of those terms based on their target population as well as housing market conditions.
[13] This outcome is defined as "Families that move to a higher level on the income dimension of the Arizona Self-Sufficiency Matrix."

Part 2: Partner Characteristics

The Siemer Institute network of funded programs includes more than 50 United Ways and more than 80 direct service providers.[14] In addition to the performance data submitted by direct service providers, each partner submits a detailed profile that describes their strategy, services, priorities, and challenges. We can use that information to gain a deeper understanding of how our partners operate, the challenges they face, and what they hope to achieve in the future.

Program Type

Service providers were asked to characterize their programs in just a few words to capture their views about the defining feature or core purpose of their programs. Table 4 depicts those brief characterizations. There were three very common characterizations used by service providers – Housing Stability/Homelessness Prevention Program (35%), Financial Stability/Financial Capability Program (28%), and School-Based Program (19%).[15] Together, these represent more than three-quarters of all responses. Less common were case management programs (7%), and a mix of Other Program Types (11%).

Table 4: Direct Service Providers Self-Described Program Types	
Program Type	Percent of Reponses
Housing Stability/Homelessness Prevention Program	35%
Financial Stability/Financial Capability Program	28%
School-Based Program	19%
Other Program Type_a	11%
Case Management Program	7%
	n=83

a. Other Program Types includes affordable housing, education, and basic needs.

This variety of characterizations indicates that there are meaningful differences among our partners in terms of their strategies and services. However, all partners are focused on housing and school stability, they all help families overcome housing crises, and then they provide case management/coaching services to help families set and achieve goals to facilitate longer term stability.

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[14] A small number of United Way partners provide services directly to families through local United Way Initiatives, therefore they do not use outside service providers to provide services for their Siemer Institute program.

[15] A financial stability program is a broad term for a program that emphasizes budget literacy, managing expenses, and possibly increasing income to develop a balanced household budget. A financial capability program is a type of financial stability program in which there's an emphasis on asset building and debt reduction. Financial capability programs typically provide services to program participants to increase income, increase savings, reduce debt, and improve credit scores.

Many of our partners engage with families for 12 months or more to help them achieve goals and build skills for a stable future. However, the first three months of program participation are a critical time when our partners help families avert homelessness while staff build trust with families so that they can have a productive relationship. Table 5 below depicts the frequency with which program staff and families meet during the first 3 months of program enrollment. Ninety percent (90%) of service providers meet with families once a week (48%) or a few times a month (42%). A small portion of service providers meet more than once a week (6%) and 3% of service providers based their meeting frequency on family needs. The first three months requires a substantial commitment from staff and families to help families move toward stability, with the typical program meeting with families approximately 9 to 12 times.[16]

Table 5: Typical Frequency meeting with New Clients in the First 3 Months of the Program

Frequency of Client Meeting	Percent of Programs
More than once a week	6%
Once a Week	48%
A Few Times a Month	42%
Depends on Circumstances	3%
	n=93

Two-Generation Programming

In 2017, the Siemer Institute developed its own operational definition of two-generation (2-Gen) programming as guidance to our funded partners seeking to enrich their 2-Gen offerings. The Siemer Institute defines 2-Gen programming as:

> *Two-Generation approaches require programs to design and deliver services that intentionally strengthen the whole family, so that all generations within the family can experience improved economic, housing, and educational outcomes. As a result, the whole family becomes more resilient to future disruptive events.*

In 2017, 88% of Siemer Institute service providers reported that they provide 2-Gen programming. All Siemer Institute-funded programs connect adults and children to needed services by offering those services in-house or by providing referrals to trusted other organizations.

Critical Services to Families

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[16] Estimated based on stated meeting frequency.

Siemer Institute partners offer a variety of services to help families overcome housing instability and other crises, and to support families as they work toward long-term stability. Service providers were asked to list the three services they provide to adults that they believed were the most critical to family stability. Table 6 summarizes the most commonly listed services and the percent of organizations reporting each service listed.

The most commonly listed critical services are broadly associated with household finances. Fifty-three percent (53%) of service providers noted that direct financial assistance was critical to helping participants achieve stability.[17] Employment services were listed by 38% of service providers as critical to stability. This includes job search assistance, skills training, and adult education. Finally, 34% of service providers noted that budget counselling, financial management, or other services focused on participants managing their incomes. These three areas help families overcome immediate financial shortfalls while they help families increase income and manage expenses.

Housing specific services also emerged as critical to stability. Nine percent (9%) of service providers also listed landlord negotiation or mediation as critical to stability, and 9% of partners listed assistance with housing search and referrals as critical. These responses reflect that low-income families often need support maintaining their current homes or to gain access to stable housing when their current housing is unstable or inadequate.

Approximately one-quarter of service providers (26%) listed case management as a critical service, while 12% noted that health services were critical to family stability.

Table 6: Most Critical Services for Stability	
Service	Percent Listing Service
Financial Assistance All Types$_a$	53%
Employment Assistance and Adult Education	38%
Budget Counseling/Financial Management	34%
Case Management	26%
Other Services$_b$	13%
Health Services (Including Mental Health)	12%
Landlord Negotiation/Mediation	9%
Housing Search Assistance and Referrals	9%
Basic Needs (especially Food)	9%
Public Benefits Assistance	6%
	n=93

a. Financial Assistance All Types includes rent assistance, utility assistance, moving assistance, and transportation assistance.

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[17] Rent assistance was the most commonly specified form of financial assistance, listed by 25% of service providers, followed by utility assistance listed by 4% of service providers.

b. Other Services includes credit repair, referrals, English language courses, life skills training, legal services, parenting classes, savings accounts, and tax assistance.

Challenges

Each service provider was asked to describe the major challenges their program will face in the coming year. Challenges could be external to the organizations (e.g. high housing costs in the community), or they could be internal challenges (e.g. staff turnover). Responses were categorized according to their primary theme. Table 7 summarizes the most common response themes that were submitted.

The most common challenge articulated by service providers was the lack of affordable, decent housing, with 25% of partners listing that as a major challenge. Partners frequently expressed that housing prices were rising quickly or that housing was simply too expensive for participants in the program. Tenants with low incomes, poor credit, or imperfect rental histories struggle to gain access to affordable housing.

Many partners responded with a set of interrelated challenges – including the need for additional funding (22%), additional staff (14%), and high demand or need to expand to serve more families (4%). These responses express a common awareness that the need for family stability services exceeds our partners' capacity in most communities.

Numerous other challenges were also expressed by providers, including that program participants earn low wages and need to upskill (6%), the need to develop new or better partnerships to help participants gain access to additional services (6%), overcoming transportation barriers (5%), and supporting immigrants (4%).

Table 7: Self-Described Challenges Service Providers Face in the Coming Year

Challenge	Percent of Challenges Listed
Limited Affordable, Decent Housing	25%
Need Additional Funding	22%
Need Additional Staff	14%
Other Challenges$_a$	14%
Low wages and Upskilling	6%
Developing New/Better Partnerships	6%
Overcoming Transportation Barriers	5%
High Demand and Expansion	4%
Supporting Immigrants	4%
	n=78

a. Other Challenges includes finding right fit families, a changing target population, disaster recovery, coordinating services, and improving data systems and data use.

Each service provider was also asked how they hoped to enhance their programs in the next year. Those responses were categorized according to their primary theme, and those themes are depicted in Table 8 below. Approximately one-third (31%) of service providers most frequently stated that they plan to enhance existing services or add new services in the coming year. One-fifth of service providers (or 21%) expect to improve their partnerships with other organizations. Eleven percent (11%) of partners intend to improve their data systems or use of data. Finally, a small portion of programs expressed a desire to enrich their 2-Gen programming or to expand services to benefit more people or to reach new locations (e.g. additional schools).

Table 8: Desired Program Enhancements in the Coming Year	
Enhancement	Percent of Providers
Enhance Existing Services or Add Services	31%
Improve Partnerships	21%
Other Enhancements[a]	19%
Improve Data Systems/Data Use	11%
Enrich 2-Gen Programming	6%
Expand Services to More People/Locations	6%
Add Staff	5%
	n=80

a. Other Enhancements includes improve communication, improve outreach, staff training, increase funding, and other enhancements that could not be readily classified.

Conclusion

In 2017, the Siemer Institute's network was able to support more families and children than ever, while continuing to improve service effectiveness. Since the adoption of the measurement framework in 2014, the network has expanded to more communities, and that expansion accounts for most of the growth in outputs and outcome successes in recent years. This growth pattern suggests that the Siemer Institute needs more partners and/or more staff working with families if we hope to substantially increase our impact in the future. This could be done by adding new communities to the network, or it could be accomplished by expanding existing programs to include new service providers, or new staff at current providers. New resources from the Siemer Institute, local United Ways, and/or direct service providers will be required.

Although our partners are working toward the same goals, their self-reported program types, their challenge, and their desired enhancements indicated that these programs have meaningful differences in what they do with families, the challenges they face as organizations and communities, and the ways they hope to overcome those challenges in the future. The Siemer Institute will continue to explore effective program practices while encouraging our partners to be the local leaders of this work.