

CONNECTS

CASEY

FALL 2002
A REPORT FROM THE
ANNIE E. CASEY FOUNDATION

IN THIS ISSUE: Group Helps Low-Income Families Own a Piece of the American Dream; Resource Corner; INSITES

PARTNERSHIPS CREATING AN “ECHO CHAMBER” OF FAMILY STRENGTHENING MESSAGES

Goodwill Industries International, Inc. knows from experience that family issues are often what trip up adults struggling to gain a foothold in the workforce.

That’s why one of its key strategies for the 21st century is to “take a whole family approach” to help people reach economic self-sufficiency by addressing issues like child care, transportation, medical care, parenting classes, housing, literacy, and social support.

Many local Goodwill agencies were reaching out to families in these ways, but the organization needed a way to identify and promote the best examples throughout its network. The FAMILIES COUNT Family Strengthening Awards, a program that the Annie E. Casey Foundation and national organizations cosponsor to honor exemplary efforts to help support families and communities, offered just that.

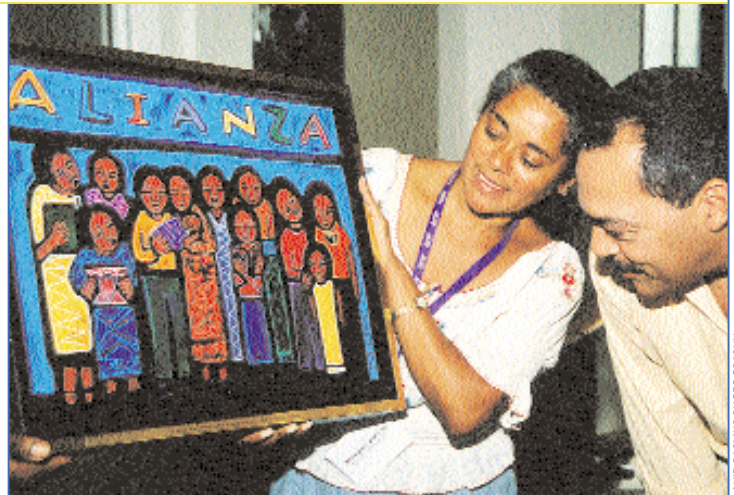
The awards “have provided an excellent ‘carrot’ to surface and reward outstanding programs that strengthen families,” says George W. Kessinger, Goodwill’s president and chief executive officer.

Family strengthening awards are just one way the Casey Foundation is working with influential national groups to help families and neighborhoods get the support they need to raise healthy, happy, and productive children.

While our *Making Connections* initiative works toward results for families in specific places, strategic partnerships with national groups help create an “echo chamber” of messages and models that can help make family strengthening a national priority.

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Family **STRENGTHENING** awards are just one way the Casey Foundation is working with **INFLUENTIAL** national groups to help families and **NEIGHBORHOODS** get the support they need.



Milagros Batista and Moises Perez of Alianza Dominicana, a 2002 FAMILIES COUNT honoree, receive an original oil painting at a retreat in Aspen last summer.

DAVID RASMUS PHOTOGRAPHY

GROUP OFFERS "SELF-HELP" SO LOW-INCOME FAMILIES CAN OWN A PIECE OF THE AMERICAN DREAM

Nearly 25,000 families and entrepreneurs own homes and small businesses because a North Carolina group called Self-Help believed in them.

Fueled by the conviction that low-income families and communities can't

share in the prosperity of this nation if they don't own a piece of it, the Durham-based organization set out more than 20 years ago to help people who have the ambition but lack the access to capital or credit to earn their quotient of the American dream. Predictably, many of these people are minorities, women, and rural residents.

Launched with nothing more than \$77 from the proceeds of a bake sale, Self-Help has become one of the nation's leading community development financial institutions. Since 1980, it has lent \$1.8 billion to some 25,000 families and small businesses that can't get financing from traditional lenders and helped create more than 9,000 jobs.

CASEY CONNECTS

Fall 2002

*A quarterly newsletter published by
The Annie E. Casey Foundation*

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The Annie E. Casey Foundation is a private charitable organization dedicated to helping build better futures for disadvantaged children in the United States. The primary mission of the Foundation is to foster public policies, human-service reforms, and community supports that more effectively meet the needs of today's vulnerable children and families. In pursuit of this goal, the Foundation makes grants that help states, cities, and neighborhoods fashion more innovative, cost-effective responses to these needs.

"There are a large number of people who, given the chance to own a home or business, will do whatever it takes," says Martin Eakes, cofounder and chief executive officer of the Durham-based organization. "But many of them have been left behind economically, and that's just wrong."

A perfect fit with the Casey Foundation's vision for family economic success, Self-Help's accomplishments earned it a slot as a 2001 honoree in the Casey Foundation's FAMILIES COUNT: The National Honors program, which recognizes organizations taking exemplary steps to transform communities by strengthening families.

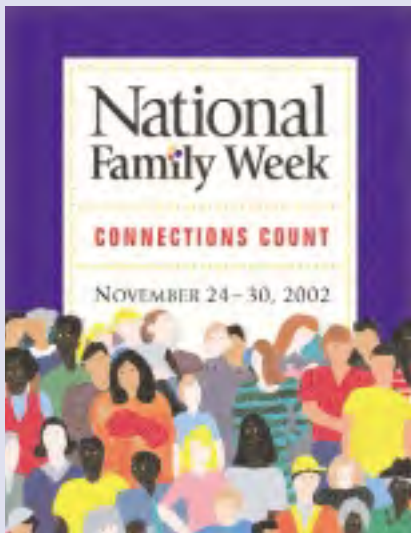
Believing jobs, homeownership, and educational opportunity are the bedrock of healthy communities, Self-Help has worked to develop affordable housing and reasonably priced office space and has financed early childhood education programs and charter schools that help families stay in racially and ethnically mixed neighborhoods. The group also lends resources and expertise to meet pressing needs, such as rebuilding after Hurricane Floyd struck North Carolina.

In June 2000, Self-Help helped launch the Latino Community Credit Union, a member-driven institution that provides a wide range of banking services for the

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Rosario Marin, Treasurer of the United States, announces a plan to open new branches of the Latino Community Credit Union. Self-Help was a key supporter of this credit union tailored for North Carolina's fast-growing Latino population.





Besides celebrating Thanksgiving with the traditional foods and festivities, families across the country were honored, entertained, educated about community resources, and invited to help recognize people and groups that help them

the most as part of National Family Week, November 24–30.

Although it's been on the books since 1968, National Family Week, celebrated annually during Thanksgiving week, has assumed greater prominence in recent years and sharpened its focus to stress the importance of strong families and healthy communities in children's lives.

The Alliance for Children and Families, a Milwaukee-based organization that coordinates National Family Week, has worked with the Casey Foundation to raise the event's profile and adopt the theme Connections Count, highlighting connections to economic, social, and institutional support critical to families. The Alliance has a broad reach because it represents organizations serving nearly 8 million people in 6,700 communities.

More than 100 local events were held for National Family Week this year.

Thanks to partnerships forged by the Alliance and the Foundation, many national organizations encouraged their members and constituents to participate. The Foundation also sponsors a mini-grant program that helps Alliance members promote National Family Week.

This year's events included family summits and policy forums, community festivals, resource fairs, seminars, community improvement activities, family suppers, awareness campaigns, proclamations by mayors and governors, and recognition programs for people, groups, and businesses doing exemplary work to strengthen families. For more information, visit www.nationalfamily-week.org or call 1-800-221-2681.

PARTNERSHIPS

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For example:

- A deepening relationship with the United Way of America and a special fellowship for key local United Way personnel have helped shape the kinds of family-strengthening initiatives and themes being supported by the organization, which spends \$4 billion annually. The partnership also has helped influence a number of local United Ways to incorporate into their work outcomes related to family strengthening and family economic success.

- The Coalition of Community Foundations for Youth held an executive education program for CEOs of community foundations this year to promote linkages between child, family, and neighborhood well being in their philanthropy.

The impact of the two weeklong sessions is already visible in the way participating foundations are doing their work. For example, following the program, one community foundation conducted an intensive data analysis and interview process that led the group to focus its grant making on three high-poverty neighborhoods and give priority to efforts “that work with the whole person in the context of their family and neighborhood.”

- The Points of Light Foundation, which works with more than 50 million volunteers, 100 nonprofit partners, and 300 corporate partners, has rethought the way it works in low-income communities.

Rennie Dutton, a special assistant to the Points of Light Foundation's chief executive officer, says its partnership with the Casey Foundation inspired Points of Light to look at how volunteers can be used more effectively in low-income



Barbara Clinton, Ambassador James Joseph, and Mary Braxton Joseph at the 2002 FAMILIES COUNT retreat.

communities, and to recognize and enhance the work low-income residents already are doing in their communities.

The partnership “has enabled us to help middle-class volunteers to be better partners to low-income communities,” says Dutton. “It also has pushed us to empower people who don't have a lot of

DAVID RASMUS PHOTOGRAPHY

resources to do their own work to improve communities.”

Partnerships like these are part of a broader campaign that also links up with major organizations representing key local, county, and state decision-makers, such as the National Conference of Mayors and the National Governors’ Association. The campaign also seizes opportunities to reach “socially engaged” audiences.

The Foundation also sponsors the FAMILIES COUNT: The National Honors program, which recognizes projects doing exemplary work to help families and communities. The FAMILIES COUNT Family Strengthening Awards also provide support to organizations, like Goodwill, that have started family strengthening awards programs for their members.

These partnerships “reflect the understanding that a foundation can do more than just provide grants,” noted Peter Goldberg, president and chief executive officer of the Alliance for Children and Families. “The concept of having national partners is an effort to strengthen our capacities and build connections between and among us—it’s trying to make the whole greater than the sum of its parts.”

The Foundation helps partner organizations explore ways of putting families in tough neighborhoods at the center of their work and spread the word through their own communications networks, conferences, and publications.

For example, Family Support America’s annual conference last April, attended by 2,000 people, featured a number of sessions and site visits related to family strengthening and family economic success. The group’s publications have increasingly highlighted promising practices and examples of family and neighborhood strengthening approaches in family-support settings.

These PARTNERSHIPS reflect the understanding that a foundation CAN DO MORE than just provide grants.

Some newer partners include the National Assembly for Health and Human Services, a network of more than 60 national organizations that spend \$32 billion, and Corporate Voices for Working Families, a new organization that includes 30 leading national corporations that have joined forces to help improve supports for working families.

An important goal of these efforts is to help the partners come together to share their successes and challenges. In back-to-back meetings in Aspen, Colorado, last summer, the Foundation brought together 2002 FAMILIES COUNT honorees and also convened a meeting of national partners. At both events, a focal point was sharing strategies to

improve the economic futures of low-income working families.

Steven Dow, executive director of the Community Action Project (CAP) of Tulsa County, a 2000 FAMILIES COUNT honoree, shared CAP’s success in using the Earned Income Tax Credit as an entry point for helping families save money and build assets.

Hearing how EITC campaigns throughout the country are giving cash back to low-income working families, Roxanne Spillett, president of the Boys and Girls Club of America, said: “I’m going back and make sure that every person in our entire system knows about the EITC.”

U.S. DEPARTMENT OF LABOR HONORS JIM CASEY

The U.S. Department of Labor inducted the late Jim Casey, the founder of United Parcel Service and the Annie E. Casey Foundation, into its Hall of Fame at a Washington, D.C., ceremony October 10. Paul Casey, a nephew of Jim Casey, is pictured accepting the award along with other members of the Casey family.



LIZ ROLL PHOTOGRAPHY

RESOURCE CORNER

All publications listed below can be ordered from the Foundation website (www.aecf.org) or by calling our publications voice line at 410.223.2890, unless otherwise noted.

- **KIDS COUNT SNAPSHOT – CONNECTING KIDS TO TECHNOLOGY: CHALLENGES AND OPPORTUNITIES**
This is the second in an occasional series of brief, data-based reports from the KIDS COUNT project. Co-authored by Tony Wilhelm of the Benton Foundation and Delia Carmen and Megan Reynolds of the Casey Foundation, it discusses the demographics of the digital divide, the implications of current trends, and noteworthy efforts to bridge the divide and bring all children into 21st century technical literacy.
- **MAKING FATHERS COUNT: ASSESSING THE PROGRESS OF RESPONSIBLE FATHERHOOD EFFORTS**
Written by the Social Policy Action Network, this report traces the history of the fatherhood field, reviews its accomplishments, and identifies challenges. It offers a chronology of public and private activities contributing to this movement and highlights the emergence of individual leaders.
- **PROVIDING THE MISSING LINK: A MODEL FOR A NEIGHBORHOOD-FOCUSED EMPLOYMENT PROGRAM**
Workforce development strategies focused on neighborhoods have the potential to help residents improve their economic standing and to improve neighborhood conditions. Citing several neighborhood employment projects as examples and drawing on interviews, site visits, and research,

this report outlines a model for a comprehensive, neighborhood-focused workforce development strategy.

- **LEARNING FROM THE JOURNEY: REFLECTIONS ON THE REBUILDING COMMUNITIES INITIATIVE**
Written by Cornerstone Consulting Group, this report reflects on six key lessons learned from the Foundation's Rebuilding Communities Initiative (RCI). The lessons are culled from community residents involved as well as Foundation staff, technical assistance providers, and lead agency staff.
- **PATHS TO LEADERSHIP IN COMMUNITY CHANGE: A REVIEW OF LEADERSHIP DEVELOPMENT MODELS IN THE REBUILDING COMMUNITIES INITIATIVE**
This study by the Development Training Institute compares leadership development techniques used in the five RCI neighborhoods. The study offers a conceptual framework that helps people better understand community-based leadership development and a series of lessons for organizations that fund leadership development in communities.
- **SPEAK UP: TIPS ON ADVOCACY FOR PUBLICLY FUNDED NONPROFITS**
Successful advocacy can change laws and regulations, allocate funding for needed programs, and improve how services are delivered. But some organizations wonder if speaking out will take too much time and resources or even endanger their government contracts or nonprofit status. This manual, written by the Center for an Urban Future, spells out why groups should consider advocacy and how to get beyond some common roadblocks.

It will be distributed to select Foundation grantees and other community groups interested in advocacy.

- **THE BIG IDEA: A STEP-BY-STEP GUIDE TO CREATING EFFECTIVE POLICY REPORTS**
Published by the Center for an Urban Future, this guide was written for people looking to communicate their ideas to decision-makers at all levels of government and can help nonprofits, advocacy groups, foundation leaders, public policy experts, and researchers.
- **UPDATE: LATEST FINDINGS IN CHILDREN'S MENTAL HEALTH**
Stemming from a partnership between the Casey Foundation, Rutgers University, and the U.S. Department of Health and Human Services, this is the first in a series of short bulletins for policymakers, mental health professionals, child advocates, and others interested in child and adolescent mental health.
- **MAKING CONNECTIONS TO IMPROVE EDUCATION: A SNAPSHOT OF SCHOOL-BASED EDUCATION INVESTMENTS IN SEVEN MAKING CONNECTIONS SITES**
This report offers a snapshot of some of the Foundation's education investments in seven *Making Connections* communities: Baltimore, Denver, Indianapolis, Milwaukee, Oakland, Providence, and San Diego. The report describes the characteristics of schools in these communities, the goals of education initiatives, and the work under way as part of *Making Connections*. It also discusses the initial impact of the work on conditions, policies, practices, and resources for children and families; looks at challenges ahead; and discusses common themes across sites.



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state’s fast-growing Latino population. Self-Help and the State Employees Credit Union encouraged Latino leaders to fashion their own financial institution not only to help local families build assets, but also to curb the crime that was occurring because such a high percentage of people in the largely Mexican-American immigrant population were not using banks.

“Most were hard working people who got paid on Fridays in cash and got robbed on Friday nights, so the safety of the Latino community was very much an issue,” notes Malcolm White, Self-Help’s communications director. Efforts to tailor services to the unique needs of Latino residents and give them a stake in its ownership have driven membership upwards of 7,000, far exceeding original projections, and led to a new branch in Charlotte and plans for another in Raleigh.

Redressing inequities suffered by America’s underclass is a guiding principle in all Self-Help’s work.

“A lot of the force and passion for Self-Help in the early years was really aimed at trying to undo the long-term effects of segregation and slavery,” notes Eakes. “We’re a civil rights organization first and foremost.”

Consistent with that focus, Self-Help aggressively fights predatory lending practices. “We recognized that all of our nationally recognized work in community development would be useless if we could not stop the finance industry from stripping wealth from minority and poor communities faster than we could help create that wealth,” the group explained in a recent proposal to launch a new Center for Responsible Lending.

“Some of our borrowers have been refinanced out of their loan and go into foreclosure or even bankruptcy years later,” says White. “Predatory lending was threatening to turn our success stories into failures.”

Self-Help organized the broad North Carolina Coalition for Responsible Lending that won passage of the first strict law in the nation against predatory mortgage lending and then secured companion legislation regulating mortgage brokers. The group is now working with advocates and legislators in other states to enact more such laws.

Using data has been an important advocacy tool for Self-Help. It has quantified the nationwide cost to Americans of predatory lending in the purchase or refinancing of homes at \$9.1 billion a year in lost equity. It has also wielded

numbers to demonstrate how high-fee lenders are targeting low-income communities, and to rebut the argument that tougher laws will slam the door on people who have no other way to get credit by showing that two years after North Carolina enacted its reforms, subprime lending was thriving.

Self-Help also has offered lending, legislative, and research savvy to people fighting predatory lending elsewhere. The group is a particularly formidable adversary to the industry because it knows “the devil in the details” often lodged in the small print of loan-closing agreements, White notes.

The Center for Responsible Lending, to be headed by Self-Help President Mary Mountcastle, aims to better export its skill in fighting predatory practices beyond North Carolina. In time, it hopes to have a staff of 66 lawyers and to conduct legislative and policy advocacy, litigation, investigations, data analysis and research, and coalition building. It also intends to move beyond mortgage and payday lending to combat a wide range of financial practices that threaten low-wealth communities. “There’s a whole range of financial abuses out there,” says Mountcastle, “and we intend to attack them all.”