

# ACCESS NYC Outreach and Marketing A Program of HHS-Connect and the Department of Information Technology and Telecommunications (DoITT)

## PROGRAM REVIEW SUMMARY

This overview of the ACCESS NYC Outreach and Marketing initiative is based on a program review conducted by Westat/Metis staff for the evaluation of the Center for Economic Opportunity (CEO) initiatives. The evaluation team collected program review data between May and September 2008 through interviews with key staff from CEO, the Office of the Deputy Mayor for Health and Human Services, HHS Connect and ACCESS NYC, and a review of program documents, monthly data reports through June 2008, and newsletters.

**Sponsoring Agency:** HHS-Connect, through the New York City Department of Information Technology and Telecommunications (DoITT)

**Provider Agency:** ACCESS NYC

**Start Date:** Fall 2006

**CEO Budget:** \$2,750,000 for FY 2008

**Target Population:** New York City (NYC) residents, primarily with low- to moderate-incomes

**Statement of Need:** Over 46 percent of households in NYC living in poverty have a head of household who is working. Many of these households critically need assistance from human services programs, encompassing government benefits and human development services such as employment and workforce training. However, access to these benefits can be complicated: to apply for human service programs a city resident may be required to visit many separate providers and complete multiple application forms, many of which ask for duplicative data.<sup>1</sup>

**Goal and Services:** ACCESS NYC is a free Internet-based service that identifies and screens for 35 city, state, and Federal human service benefit programs. The staff are continually working to add more programs and increased functionality (e.g., online program applications) and site use. CEO has funded marketing and outreach efforts aimed at increasing the latter. The goal of ACCESS NYC Outreach and Marketing is to promote financial stability among NYC residents by providing greater access to human services programs. Steps to achieving this goal include increasing knowledge and use of ACCESS NYC among human service organizations and residents and changing the way people think about applying for benefits and programs.

The services provided by the program can be categorized broadly into four groups: outreach to organizations through trainings and presentations, outreach to clients through screening counselors, a marketing campaign, and the distribution of computer terminals in public locations throughout the city.

**Eligibility Criteria:** There are no eligibility criteria for this program. Any NYC resident can use the website to gather information and determine eligibility for other services.

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<sup>1</sup> Center for Economic Opportunity (December 2007), *Strategy and Implementation Report*. New York: Center for Economic Opportunity.

**Targets/Outcomes:** Table 1 presents the actual numbers for key outcomes of interest from October 2007 to June 2008. As can be seen from Table 1, over 19,000 visits were made to the ACCESS NYC website in June 2008, the last month for which data are available.

**Table 1. ACCESS NYC: Monthly Outcomes and Activities<sup>2</sup>**

Month	Visits to Website	People Trained in Outreach to Organization	Clients Screened by Counselors	Key Outreach Activities
Oct. 2007	9,608	286	0	
Nov. 2007	8,126	345	0	
Dec. 2007	6,359	751	0	● Outreach staff begin providing hands-on training
Jan. 2008	10,935	727	37	● "CBO on-site counselors" counselors begin screening at Union Settlement and Citizens Advice Bureau
Feb. 2008	11,834	420	205 335	● Tax Prep Plus screening begins "CBO on-site counselors" counselors begin screening at Groundwork
Mar. 2008	13,510	558		● "CBO on-site counselors" counselors begin screening at Catholic Charities
Apr. 2008	13,314	516	381	● Tax Prep Plus screening ends ● 200 posters on subway platforms
May 2008	17,020	636	152	● Ads in 44 check-cashing offices and in 50% of subway cars
June 2008	19,204	248	210	

### Selected Key Findings

**Fidelity to the Program Model.** Overall, the fidelity to the program model is excellent. Although there have been programmatic deviations from the implementation plan, these changes have been consistent with the general goals and logic of the program.

**Characteristics of the Clients Served in Comparison to the Target Population.** Confidentiality requirements for the ACCESS NYC screening tool make it impossible to obtain individual client data. However, because the tool is most useful to low- to moderate-income New Yorkers who may qualify for benefits, it is likely that the vast majority of website visitors fit the characteristics of the target population.

**Service Delivery.** Over the period of September 2007 through June 2008, ACCESS NYC staff conducted 194 training sessions and trained 4,717 individuals, primarily in CBOs and other government agencies, on how to help their clients use the screening tool on the website. In some cases, training has developed into ongoing technical assistance.

Screening for clients by counselors has been divided into three models:

1. ACCESS NYC screenings are offered to New Yorkers by mobile teams. This program, implemented by the Human Resource Administration's (HRA) Food Stamp and Nutritional Outreach Program (FSNOP), incorporated ACCESS NYC screenings for their clients beginning in August 2008.
2. ACCESS NYC screening is added to an initiative that serves the working poor who come in for some other service (Tax Prep Plus). This program accounted for more than 10 percent of all visits to the screening tool during tax season.

<sup>2</sup> June data for outreach to organizations and February-April data for clients screened by counselors are reported, but should be considered approximate because there was an inconsistency in the June training data and the data for the Tax Prep Plus initiative have not been verified.

- ACCESS NYC adds a dedicated on-site benefits-screening counselor at CBOs that serve the target population. These counselors were trained and started seeing clients between January and March 2008. From March to June, they collectively screened an average of 9.7 people each day.

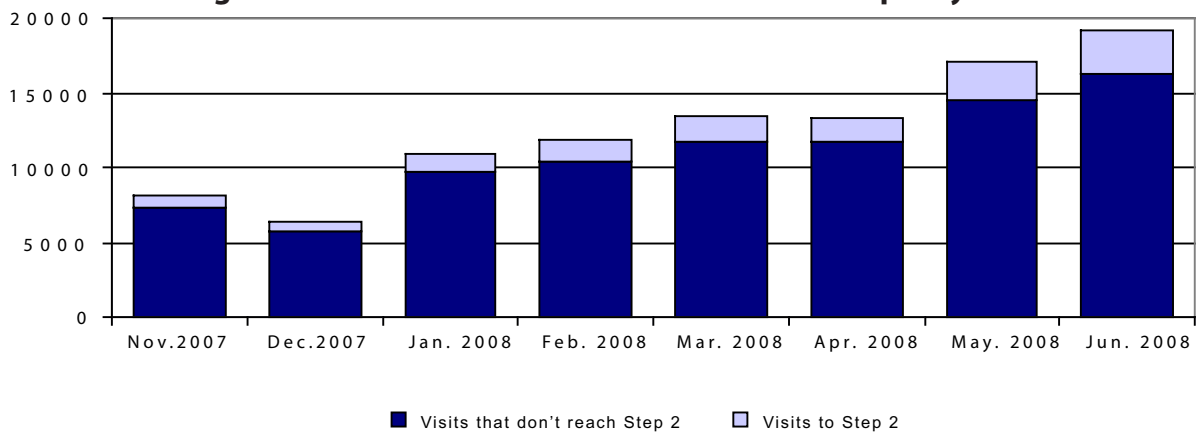
The marketing campaign was fully rolled out starting in April 2008 with ads in subway cars, on platforms and in check-cashing offices. Promotional materials with the look and feel of the marketing campaign were produced in May and June. The computer and printer distribution is underway with plans to distribute approximately 223 terminals to 146 qualifying non-profits and make 322 more terminals available to government agencies with public offices. These terminals are intended exclusively for clients to use the ACCESS NYC screening tool.

**Provider Capacity.** A five-person team handles the initiative, and there is consensus that this staffing level is sufficient to handle the outreach models. The program is capably collecting and reporting monthly performance monitoring data.

**Agency Management.** Although management within the ACCESS NYC Outreach and Marketing program has been consistent over the life of the project, oversight has evolved. Oversight initially came from the Office of the Deputy Mayor for Health and Human Services (DMHHS) and the Department of Information Technology and Telecommunications (DoITT), with funding to provide training and outreach coming from CEO. DMHHS has had an ongoing role in establishing goals for the project, and recently ACCESS NYC has come under the jurisdiction of HHS-Connect, the technology-oriented project of the Deputy Mayor for Health and Human Services, to coordinate agency practices in order to more efficiently provide Health and Human Services to New Yorkers.

**Early Outcomes.** Table 1 illustrates that the number of visits to the website is quite high, but only about 14 percent of these visits progress to step 2, where the screening process is completed. Thus increasing the percentage of step 2 visits is an important goal for program staff. In fact, as shown in Figure 1, over the last 5 months there has been an increase in visitors to step 2 in every month except April. The percentage of step 2 visits is presented above each bar.

**Figure 1. ACCESS NYC: Visitors and Visitors to Step 2 by Month**



### Conclusions and Recommendations.

As implemented, the ACCESS NYC Outreach and Marketing initiative is aligned with the CEO mission and is an important component of the City's broad anti-poverty strategy. The ACCESS NYC Outreach and Marketing initiative emphasizes the power of the website as a comprehensive tool to screen for all major public benefit programs. Although a causal relationship cannot be established, outcome data for this program show promise by indicating steadily increasing use of the website. The more visits there are to the site, the more NYC residents will become aware of the multiple benefits and service programs available to them.

**ACCESS NYC Outreach and Marketing**  
**A Program of HHS-Connect and the Department of Information Technology**  
**and Telecommunications (DoITT)**

**PROGRAM REVIEW REPORT**

**1. Introduction**

The Center for Economic Opportunity (CEO) has funded approximately 40 initiatives across some 20 sponsoring agencies aimed at reducing the number of working poor, young adults, and children living in poverty in New York City (NYC). CEO is committed to evaluating its programs and policies and is developing a specific evaluation plan for each of its initiatives. For example, several major new initiatives will implement random assignment evaluations or other rigorous designs. Some programs are slated to receive implementation and outcome evaluations, while others may be evaluated using readily available administrative data. This differentiated approach reflects the varied scale of the CEO interventions, data and evaluation opportunities, and finite program and evaluation resources. Westat and Metis Associates are evaluating many of these programs on behalf of CEO. The purposes of the evaluations are to collect and report data on the implementation, progress, and outcomes of the programs in the CEO initiative to inform policy and program decision-making within CEO and the agencies that sponsor the programs.

The first phase of the Westat/Metis evaluation is to conduct a systematic review of selected CEO programs. The program reviews involve Westat/Metis staff reviewing program documents, obtaining available implementation and outcome data, interviewing program administrators, and, where appropriate, going on-site to observe program activities and interview direct service staff and participants. The results are used to assess the program design and implementation, develop a logic model to represent the underlying theory of each program, determine the extent to which the program meets key CEO criteria, examine the measurement and information systems for the program, and provide options for next steps.

Information and data for this Program Review Report are based on interviews conducted by Westat/Metis staff between May and September 2008 with staff of CEO, the Office of the Deputy Mayor for Health and Human Services, and HHS-Connect/ACCESS NYC, as well as a review of program documents, monthly data reports, and management reports through June 2008.

This Program Review Report provides an assessment of the program on several dimensions, including its goals, fidelity to the program model, target population and clients served thus far, program services, and agency management. CEO and the sponsoring agency were invited to identify specific questions of interest to be included as part of these standardized program reviews.

A key analytic tool in the program review is development of a logic model that serves as a visual representation of the underlying logic or theory of a program. The program logic model details the program's context, assumptions, and resources and their relationships to one another. By examining the program's internal logic and external context, the evaluation team and reader are able to determine if the program design is consistent with overall goals and capable of achieving its intended outcomes. Toward this end, this report focuses on early outcomes and the challenges faced in achieving them.

## 2. Overview and Assessment of the Program

ACCESS NYC is a free Internet-based service that screens New York City residents for 35 City, State, and Federal human service benefit programs. CEO has funded an Outreach and Marketing initiative that raises awareness of the program and teaches staff at Community-Based Organizations (CBOs) and city agencies about how to use ACCESS NYC with their clients.

**Program Goals.** The goals of ACCESS NYC Outreach and Marketing are threefold.

- (1) Increase usage of the ACCESS NYC web-based screening tool.
- (2) Through trainings, encourage individuals who serve the working poor to think about benefits screening holistically, centered on addressing personal or client needs.
- (3) Support the central goal of ACCESS NYC—promoting financial stability for NYC residents by providing better access to benefit programs.

Although the services provided by the website are not under consideration here, it would be difficult to understand the goals of the Outreach and Marketing program without understanding ACCESS NYC. The ACCESS NYC website builds on existing screening tools created by local non-profits that were designed to be used with the assistance of a trained staff person at an agency or organization. In contrast, however, ACCESS NYC was designed to allow New Yorkers to self-screen, empowering individuals to find out about resources that could help them achieve financial stability. Self-screening makes benefit screening inherently client-centered and more flexible because it can be used with or without assistance.

ACCESS NYC continues to enhance its functionality, including the ability to screen for more benefits and facilitating on-line applications.<sup>1</sup> Recently ACCESS NYC has come under the jurisdiction of HHS-Connect, the technology-oriented project of the Deputy Mayor for Health and Human Services, to coordinate agency practices in order to more efficiently provide Health and Human Services to New Yorkers.

To promote productive use of ACCESS NYC, CEO has funded a variety of outreach and marketing efforts. This variety presents an opportunity to test the efficacy of different models in increasing site use and screenings, although comparing impacts across models is difficult because of the varied circumstances in which they were implemented. The strategies include:

- Outreach and training sessions for CBOs and city agencies;
- Three pilot programs where counselors promote the use of the site and assist clients in using the tool, as needed;
- Marketing to New Yorkers through a 4-month city-wide poster campaign and the design and dissemination of training materials; and
- Distributing computers to CBOs and city agencies<sup>2</sup> to make ACCESS NYC accessible to clients at their locations.

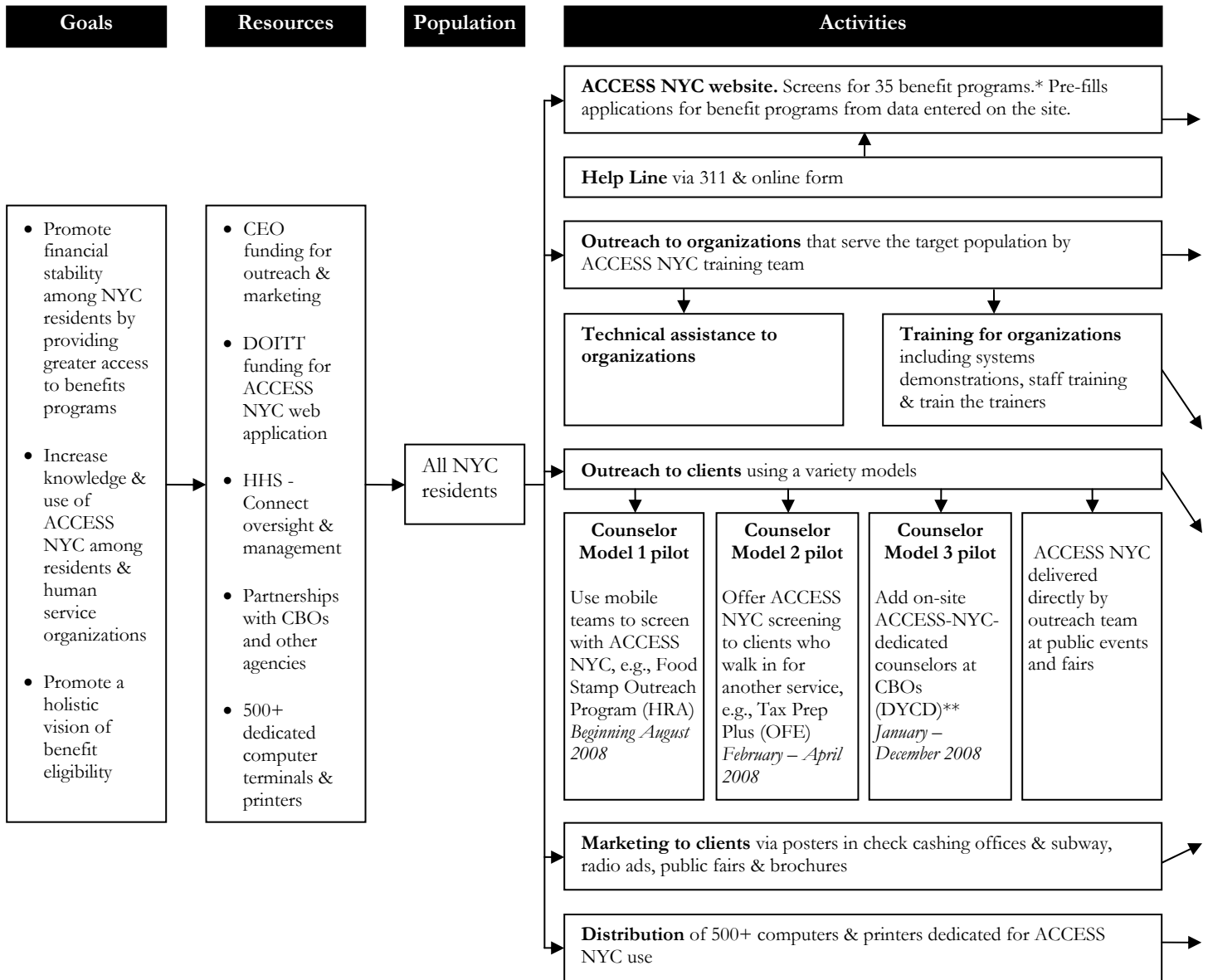
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<sup>1</sup> Visitors can print out completed or blank applications that they then need to take to specific benefits offices with appropriate documentation. Starting August 28, 2008, the site began to send on-line applications directly to the appropriate office for School Meals, and there are plans to extend this option to more applications.

<sup>2</sup> The computers were offered initially to CBOs alone; the offer was expanded to city agencies because of insufficient applications from CBOs.

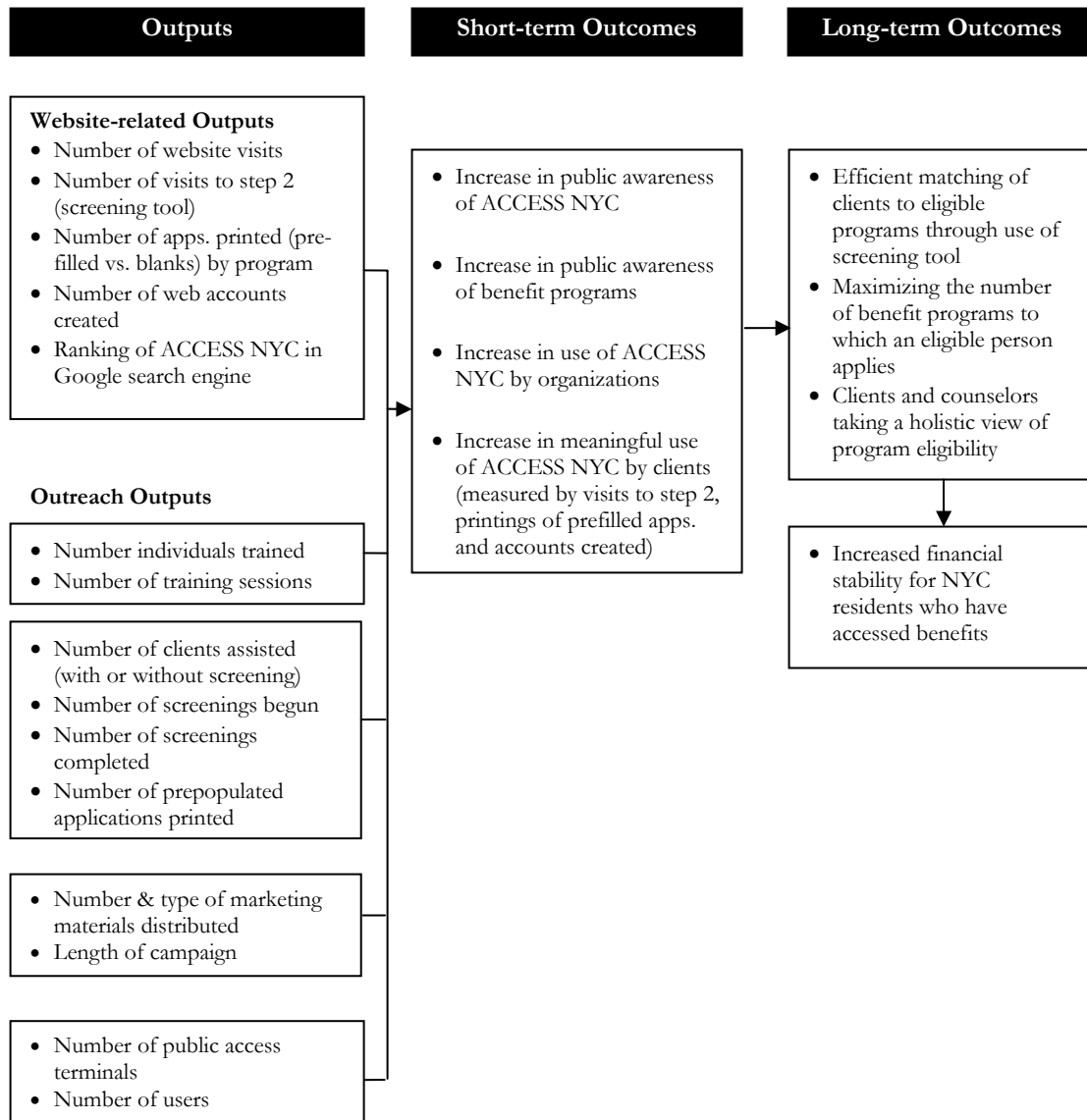
The ACCESS NYC Outreach and Marketing program is displayed in a logic model—or theory of action—format on the following two pages. The logic model includes the program’s context, assumptions, and resources. Each activity is linked to the number of individuals targeted to participate in the different activities (outputs), as well as short- and long-term participant outcomes.

# ACCESS NYC Outreach and Marketing Logic Model



\* Commodity Supplemental Food Program; Food Stamps; School Meals; Summer Meals; Women, Infants and Children; Nurse-Family Partnership; Child Health Plus B; Family Health Plus/Medicaid; Healthy NY; Medicaid (adults); Medicaid (children); Medicaid Excess Income; Prenatal Care Assistance Program/Medicaid; Disability Rent Increase Exemption; Disabled Homeowners Exemption; School Tax Relief; Section 8 Housing Assistance; Senior Citizen Homeowners' Exemption; Senior Citizen Rent Increase Exemption; Veterans Exemption; Child Care; Head Start; Out-of-School Time; Universal Pre-kindergarten; In-School Youth Employment Program; New York State Unemployment Insurance; NYCHA Resident Employment Services; Senior Employment Services; Summer Youth Employment Program; Workforce1; Cash Assistance; Child and Dependent Care Tax Credit; Child Tax Credit; Earned Income Tax Credit; Home Energy Assistance Program.

\*\* CBO model at Catholic Charities, Citizens Advice Bureau, Groundwork, and Union Settlement



**Context**

Over 46% of households in NYC living in poverty have a head of household who is working.<sup>1</sup> For many of these households, it is critical to receive assistance from human services programs, encompassing government benefits and human development services such as employment and workforce training. However, access to these benefits can be complicated: to apply for human service programs a city resident may be required to visit many separate providers and complete multiple application forms, many of which ask for duplicative data.

<sup>1</sup>Center for Economic Opportunity (December 2007), *Strategy and Implementation Report*. New York: Center for Economic Opportunity.



**Fidelity to the Program Model.** The model used by the program to achieve these goals is shown in the logic model on the previous two pages. Overall, the Westat/Metis team concluded that implementation of the program is excellent. The purposeful use of different approaches to reach the target population provides an opportunity to explore individual versus assisted use of the screening tool.

Although there have been some deviations to program implementation as it was originally conceived, these changes have been consistent with the program's general goals and logic. Examples include (1) the expansion of outreach and training to organizations to include more technical assistance beyond the training sessions, and (2) the adaptation of the computer distribution program to include city agencies when there were insufficient applications from CBOs.

**Target Population and Clients Served.** ACCESS NYC provides information to anyone interested in learning about city, state, and Federal benefits, including information about whether a New York City resident might be eligible for those programs based on user-supplied information. However, ACCESS NYC is primarily intended and theoretically most useful for low- to moderate-income families, who might qualify for benefits. Because anonymity is a component of the website, no user-level data are available.

**Outreach and Recruitment.** Outreach for ACCESS NYC constitutes the entirety of the Outreach and Marketing program under review. (In the context of this program there are no recruitment activities that are distinguishable from outreach.) As such, outreach efforts will be discussed in detail in the following section describing program services. Lack of Internet access among the target population, poor computer literacy, and lack of awareness of the website all limit the efficacy of ACCESS NYC. These constraints inform the rationale for the outreach program.

**Program Services.** The services provided by the program can be categorized broadly into four groups: outreach to organizations, outreach to clients, a public marketing campaign, and the city-wide distribution of computer terminals to be used solely for ACCESS NYC screenings. The five-person Outreach and Marketing team consists of a director and four staff members who each conduct trainings and support counselors who work with clients. As necessary, different staff members have taken responsibility for overseeing projects or tasks such as the design of marketing materials, the distribution of marketing materials, reporting to CEO, and the distribution of computer terminals.

The Outreach and Marketing team was formed in the summer of 2007. Over the summer the team's primary activities revolved around preparing and practicing training and presentation techniques. They worked with experts in the Mayor's Office of Adult Literacy and with the Mayor's Office of Immigrant Affairs on how best to communicate (through presentations and in written materials) so that their message would be understood by limited English proficient and low-literacy New Yorkers. This work helped to inform the development of marketing, promotional, and training materials as well as the content used in training sessions and presentations.

*Outreach to organizations.* Most of the activities of the Outreach and Marketing team are centered on reaching out to organizations that serve the target population. These activities include training staff and providing technical assistance on how to use and promote the website.

Between September 2007 and June 2008 the Outreach and Marketing team conducted trainings at various CBOs. Some trainings involved a live demonstration of the site, while others provided participants with a hands-on opportunity to use computers themselves. The team has also given presentations about ACCESS NYC at policy forums and meetings of current and prospective social workers, counselors, and other health and human service professionals. A natural constituency for trainings is the 900 CBOs to which website visitors could be referred to apply for benefits. In April 2008, the team began focusing on trainings for these CBOs beginning with those located in Brooklyn. Additional trainings will be held throughout the year in the other boroughs. In addition, in May and June, the team began working on a train-the-trainer model to help CBOs learn how to guide clients to use ACCESS NYC independently. As part of this model, after staff are trained in using the screening tool, they are trained in teaching the tool, and then ACCESS NYC staff observe and provide support while the CBO staff work with clients.

In a few cases, the training relationship has evolved into an ongoing relationship where the Outreach and Marketing team has provided technical support to help organizations assist their clients to access the website. Here the idea is to institutionalize the use of ACCESS NYC. Some organizations have approached the Outreach and Marketing team to ask for more assistance, while other similar opportunities were identified and pursued by the team.

The first example of the Outreach and Marketing team providing technical assistance started in the fall of 2007 when they began to work with the Health and Hospitals Corporation (HHC). The team provided training and extensive follow-up to financial counselors who work with patients on ways to afford medical treatment at three different sites: Gouverneur Health Care Services and Harlem Hospital in Manhattan, and Cumberland Diagnostic Treatment Center in Brooklyn. In February 2008 the team provided training to staff at the Rikers Island Central Visit House (CVH). Since then the Outreach and Marketing team has reached out to CVH staff on a frequent basis to make sure the computers are working and to provide other support.

Another example of working at an organizational level to put in place a policy for using ACCESS NYC was the Outreach team's work with the Department of Environmental Protection (DEP) and the Department of Housing Preservation and Development (HPD). In the spring of 2008, DEP began a residential service shut-off program for nonpayment of water bills.<sup>3</sup> This initiative, which seeks to increase revenues, was coupled with The Safety Net program, which connects customers with assistance programs at other city agencies (such as the Human Resource Administration and the Department for the Aging). DEP and HPD sought the assistance of the Outreach team to help prepare the city agencies to which they were referring their customers to screen for benefits using ACCESS NYC.

Outreach to organizations has also focused on raising the profile of the ACCESS NYC website on Internet search engines. To this end the team has asked city agencies and the other organizations with whom they work to link to ACCESS NYC from their own website, which increases the Google ranking of the site. Although programmatically this activity is part of outreach to organizations, the team feels strongly that Internet searches (represented by Google) are an important way to reach clients without an organization as an intermediary.

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<sup>3</sup> Statement from DEP Commissioner Emily Lloyd on FY '09 Water Rate Proposal, May 16, 2008, accessed August 29, 2008 at [http://www.nyc.gov/html/dep/html/press\\_releases/08-13pr.shtml](http://www.nyc.gov/html/dep/html/press_releases/08-13pr.shtml).

The last component of outreach to organizations is the team's participation in public fairs. These include job and health fairs, where various providers can make their services known to potential clients. At these fairs the team can reach out directly to New Yorkers who might want to screen for benefits using the site. The fairs are also an important component of outreach to organizations because of the networking opportunities they provide.

*Outreach to clients.* Because not everyone in the target population will necessarily be able to self-screen, the Outreach and Marketing team is piloting an initiative that positions counselors throughout the city to assist New Yorkers in using the website. This pilot was developed specifically to test the efficacy of assisted use of the screening tool, compared to outreach efforts that directly target clients. These "counselor" programs are categorized into three models:

1. ACCESS NYC screenings are offered to New Yorkers by mobile teams. This model is being implemented through the Human Resource Administration's (HRA) Food Stamp and Nutritional Outreach Program (FSNOP). The FSNOP mission is to screen for eligibility and enroll people to receive food stamps. They have significant experience in reaching the working poor through their mobile teams. The FSNOP program incorporated ACCESS NYC screenings for their clients beginning in August 2008.
2. ACCESS NYC screening is added to an initiative that serves working poor seeking other services. This model was implemented as part of the Office of Financial Empowerment's (OFE) Tax Prep Plus pilot program.<sup>4</sup> Remote tax sites were in place from February to April 2008, where clients paid a nominal fee for tax preparation by H&R Block. While their taxes were being prepared, clients were screened for benefits on ACCESS NYC.
3. ACCESS NYC adds dedicated on-site counselors to CBOs that serve working poor. This model is being implemented through four CBOs under contract with the Department of Youth and Community Development: Catholic Charities, Citizens Advice Bureau, Groundwork, and Union Settlement. The program began in January 2008 and was fully implemented by March 2008. There have been ongoing trainings and meetings with each of the counselors as well as opportunities for the counselors to help in training others and to network and discuss practices with other screeners.

*Public marketing campaign.* Marketing efforts have included the development of promotional and training materials as well as a 4-month (April-August) poster campaign in 50 percent of NYC subway cars, on subway platforms, and in 44 check-cashing offices in Bedford Stuyvesant (Brooklyn), Jamaica (Queens), and Mott Haven and Melrose (Bronx).<sup>5</sup> The promotional and training materials include a quick-reference guide, a guidebook, post cards, static-cling stickers, and sticky notes. Retractable vinyl posters, table covers, and t-shirts have also been produced, and the outreach staff have used these materials to raise the ACCESS NYC profile at public fairs (such as health fairs and job fairs).

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<sup>4</sup> A program of the Department of Consumer Affairs, OFE is another CEO initiative and is the first municipal office designed to educate, empower and protect city residents with low incomes and help them to make the best use of their financial resources. The Tax Prep Plus pilot program, in partnership with commercial tax preparers and CBOs throughout the city, offered remote tax preparation services for the first time in 2008.

<sup>5</sup> These communities represent three high-poverty neighborhoods where CEO is concentrating many of its programs.

*Computer dissemination.* The last program service is the distribution of more than 500 computers and printers to CBOs that meet minimal requirements (an organization must have a public area to place the equipment, be classified as 501(c)3, serve a minimum of 25 clients per day and 125 clients per month, and demonstrate its capacity to maintain the equipment). An insufficient number of requests led the program to expand the offering to city agencies with offices that are open to the public. This equipment is to be used by individual clients to view ACCESS NYC and associated websites exclusively. The distribution of terminals began in July 2008.

*Future Services.* In the fiscal year beginning July 2008 the Outreach and Marketing program entered a new phase as it began to prepare for the launch in late August of its first online application. This new expansion of the functionality of the website may present an opportunity for additional outreach. However, in the long run, the successful early outreach efforts and overall adoption of ACCESS NYC may obviate the need for on-going outreach.

**Outputs and Outcomes.** Outputs and outcomes for this program fall into two general categories: those associated exclusively with outreach and marketing activities and those associated more generally with website usage, which can be the direct or indirect result of outreach and marketing.

The program purposefully did not set targets for any of its outputs (except in the case of computer distribution where the total number of computers available was inherently a target). Because an outreach effort to promote a web service offered by city government through trainings and counselors is unprecedented in New York City, CEO felt that there was no reasonable basis upon which to build expectations.

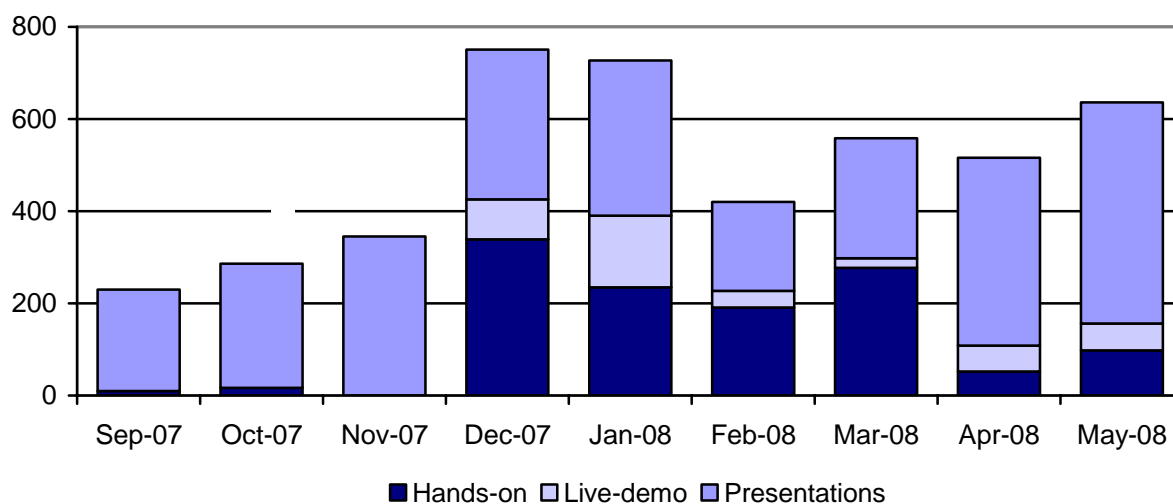
Comparing an assisted model to a self-screen model was a goal of this program. Although the output and outcome data presented in the following paragraphs do not support that level of analysis, interviews with program staff revealed that they had come to like both approaches. Self-screening is client centered, allowing clients to think holistically about using benefits to improve their financial stability. On the other hand, if clients are not able to find and use ACCESS NYC on their own, the self-screening model is ineffective. Working with counselors allows the team to reach people through organizations where they have a relationship. To combine the best aspects of each model, the team has modified their counselor training to encourage counselors to help their clients to self-screen.

Most of the activities of the Outreach and Marketing team are centered on reaching out to organizations that serve the target population, through hands-on trainings, demonstrations, or presentations. Presentations are valuable and tend to reach more people per event than the hands-on and live-demonstration trainings. The average attendance at presentations has been 38, compared with 15 for the other two types of trainings. However, the latter two may have a larger effect on site usage because they prepare trainees to go out into the field and screen their clients. Table 1 shows the number of trainings provided by the team between September and June. Figure 1 graphically displays the number of people reached by these trainings and the share of people reached by each of the three types of training. In the 194 trainings conducted through June 30, 2008, a total of 4,717 individuals were reached.

**Table 1. ACCESS NYC: Trainings by Category September 2007 – May 2008<sup>6</sup>**

Category	Sep. 2007	Oct. 2007	Nov. 2007	Dec. 2007	Jan. 2008	Feb. 2008	Mar. 2008	Apr. 2008	May 2008	Total
Training Sessions	6	9	7	28	30	29	31	23	17	194
Hands-on	1	2	0	19	16	16	19	3	5	88
Live-demo	0	0	0	2	7	6	4	7	1	32
Presentations	5	7	7	8	7	7	9	13	11	75

**Figure 1: ACCESS NYC: Individuals Trained by Training Category, September 2007 – May 2008**



Direct work with clients is an important activity overseen by the ACCESS NYC Outreach and Marketing team and is being piloted through the three models described under program services. There are not yet any outcome data for the first model where ACCESS NYC screenings are provided by mobile teams. This model was targeted (as of February 2008) to begin in April in HRA's FSNOP, but implementation was delayed because the funds transfer took longer than expected. Although the Office of Management and Budget approved a transfer of funds from DoITT to HRA in January, most funding was not received until July except for some funds released in April to purchase laptops. Two of the expected four counselors began conducting ACCESS NYC screenings in August.

The second model, where benefits screening is added to an initiative that serves the target population but where clients are seeking other services, was implemented by OFE at its Tax Prep Plus sites during the past tax season from February to April 2008. The Outreach and Marketing team provided training to implement this model. But, as with FSNOP, there was a delay in the transfer of funds and OFE paid for the initiative out of their own budget.<sup>7</sup> Outcome data from this model are presented in Table 2 and reflect that as the volume of people who walked in increased from February to April, the percentage of people being screened decreased. Between February and

<sup>6</sup> June data were excluded because of a discrepancy between the number of trainings reported in each category and the reported total.

<sup>7</sup> As with FSNOP, the timing of the funds-transfer was out of the control of the Outreach and Marketing team.

April, 538 people completed the second step at a Tax Prep Plus site compared with 4,813 total visits to the second step of the screening tool in the same period. (It should be noted that the Tax Prep Plus program pre-dated the public marketing campaign.)

**Table 2. ACCESS NYC: Tax Prep Plus (Model 2) Outcomes February – April 2008<sup>8</sup>**

<b>Outcome</b>	<b>Feb. 2008</b>	<b>Mar. 2008</b>	<b>Apr. 2008</b>
Total number of people who walked in	447	930	848
Total benefits screened	147	231	160
Ratio of screenings to client walk-ins (%)	33%	25%	19%
Number of clients who started screening process	150	231	160
Number of clients who completed screening process	147	231	160
Completion rate	98%	100%	100%
Total number of applications created	41	90	131

The third counselor model features a dedicated on-site benefits-screening counselor in a CBO. The program started at two CBOs, Union Settlement in East Harlem and Citizens Advice Bureau in the Bronx, in January, Groundwork Inc. in East New York (Brooklyn) in February, and Catholic Charities in Central Harlem in March. Although initially the counselors had difficulty reporting data, the Outreach and Marketing team worked closely with each counselor to troubleshoot problems. In April, the team introduced a new tool to make data reporting easier. According to the program’s monthly reports to CEO, the counselors have experienced a low volume of clients and, in the early months of the program, were sometimes distracted by other CBO activities. Only one counselor benefited from foot traffic and none of the counselors seem to have been well integrated into the work of the CBOs. In general, counselors had to become independent ACCESS NYC advocates and conduct their own outreach activities.

Outcomes for this model are displayed in Table 3, which aggregates the data across the four sites. The counselors attribute the large drop in the screening completion rate in March to a high volume of teenagers who were interested in the Summer Youth Employment Program, but were not able to provide information about their households for screening. Starting in May, counselors were asked to indicate how many people came in for information, including those who were not screened. Between January and June, 782 people completed the ACCESS NYC screening with an on-site counselor compared with 11,442 total visits to the second step screening tool, where the screening process is completed, in the same period. On-site counselors accounted for over 10 percent of pre-populated applications printed in that period.

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<sup>8</sup> Walk-ins and benefit screenings cannot all be verified by an independent source. OFE’s research and evaluation team spent several weeks at the end of the tax season conducting site visits and reconciling weekly data reports to ensure accuracy. The Outreach and Marketing program is confident that the data generally reflect the number of people who were reached by the program.

**Table 3. ACCESS NYC: CBO On-Site Counselor (Model 3) Outcomes January – June 2008**

Outcome	Jan. 08	Feb. 08	Mar. 08	Apr. 08	May 08	Jun. 08
Total number of people seen					163	547
Number of clients who start screening process	37	58	175	242	153	223
Number of clients who complete screening process	37	58	104	221	152	210
Rate of completion	100%	100%	59%	91%	99%	94%
Number of applications created	15	26	84	138	103	188
Number of pre-populated applications	15	26	84	138	90	137
Number of Active Sites	2	3	4	4	4	4

In regard to the public marketing campaign, it is not possible to make definitive conclusions about whether the campaign had an effect on site usage. The main outcomes related to marketing are the length of the campaign and number and types of the materials distributed, all of which were discussed under program services. However, some circumstantial evidence exists to validate the campaign's efforts. The campaign began with posters on subway platforms in targeted neighborhoods in late April and continued with subway-car ads in mid-May. Between April and May, there was a 28-percent increase in visits to the website (see Table 4). Furthermore, an optional survey on the website, although unreliable because of a very low monthly response rate ranging from 0.96 percent to 1.29 percent between March and June, showed an increase in the number of people who said they heard about the site through an advertisement. Only 4.7 percent indicated that they heard about the site through an advertisement in April, compared to 27.6 percent and 35.6 percent in May and June, respectively.

**Table 4. ACCESS NYC: Site Visits and Key Outreach Activities November 2007 – June 2008**

Month	Visits to Website	Increase Over Prior Month	Key Outreach Activities
Oct. 2007	9,608	Not applicable	
Nov. 2007	8,126	-15%	
Dec. 2007	6,359	-22%	<ul style="list-style-type: none"> <li>Outreach staff begin providing hands-on training and begin ramping up volume of all training offerings</li> </ul>
Jan. 2008	10,935	72%	<ul style="list-style-type: none"> <li>"CBO on-site counselors" counselors begin screening at Union Settlement and Citizens Advice Bureau</li> </ul>
Feb. 2008	11,834	8%	<ul style="list-style-type: none"> <li>Tax Prep Plus screening begins</li> <li>"CBO on-site counselors" counselors begin screening at Groundwork</li> </ul>
Mar. 2008	13,510	14%	<ul style="list-style-type: none"> <li>"CBO on-site counselors" counselors begin screening at Catholic Charities</li> </ul>
Apr. 2008	13,314	-1%	<ul style="list-style-type: none"> <li>Tax Prep Plus screening ends</li> <li>200 posters on subway platforms</li> </ul>
May 2008	17,020	28%	<ul style="list-style-type: none"> <li>Ads in 44 check-cashing offices and in 50% of subway cars</li> </ul>
Jun. 2008	19,204	13%	

The last component of the Outreach and Marketing activities is computer and printer dissemination. The original target for this program was to deliver 545 terminals in early- to mid-July 2008. However, as of July 10, no computers or printers had been distributed. Although over 400 requests

for applications were received, fewer than 100 terminals were requested by the original application deadline of May 31. The deadline was extended, and as of the new June 30 deadline, 223 terminals were set to be delivered to 146 CBOs. It is not possible to say whether under-subscription could be attributed to limited marketing<sup>9</sup> of the program or to a lack of demand for terminals under the terms of the program. The application process for CBOs will be reopened and will be expanded with no deadline and will include city agencies with public offices sometime this fall.<sup>10</sup>

To understand the outputs and outcomes related to the website (including the number of website visits, visits to the screening tool, applications printed, and web accounts created), it is important to note that the site and screening tool have three steps. These steps are, generally speaking, preceded by a visit to the language selection page and the home page. From the home page, a user can choose to start step 1 or follow various links to information about benefits and services.

- Step 1. Users provide general information about their household to get an idea of the kinds of programs that might be available to them. At the end of this stage, users are provided with a list of programs and can print blank applications, get information on how to apply, or follow links to the websites of these programs to learn more. Alternatively, they can continue to step 2.
- Step 2. In the second step, users enter more detailed information about themselves and their household. ACCESS NYC then provides more specific information about those programs for which they might be eligible.
- Step 3. In the final step, ACCESS NYC provides assistance with the application process, including pre-filling the application forms for eligible programs with the information provided in step 2.

In steps 2 and 3, users can create an account that saves their personal information for 60 days.<sup>11</sup> This allows users to return and edit their information as well as further explore their options without having to reenter their personal information each time. The Marketing and Outreach team tracks the number of visits to the site (starting from the language selection page) as well as the number of visits to step 2. Any visit to the site could potentially lead a user to valuable information about benefits and services, but visits to step 2 can provide the user with information about their own household, information which they could not have accessed anywhere else on the Internet.

As can be seen in Table 4, use of the ACCESS NYC website peaked in June 2008 with over 19,000 visits. Examining trend information over the last 9 months (from October 2007 through June 2008), Table 4 shows that the number of visits to the site rose steadily (excluding a seasonal dip around the holidays and a leveling off from March to April). Key outreach activities are presented alongside the usage figures. While the marketing campaign, which began in April, may have had an immediate effect on visits to the website, other outreach efforts, especially training, would be expected to have a more gradual effect.

Although Table 4 illustrates that the number of visits to the website was quite high, only about 14 percent of those visits progressed to step 2, where the screening process is completed. However, as

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<sup>9</sup> Marketing, in this case, consisted of an email to CBOs and nonprofits.

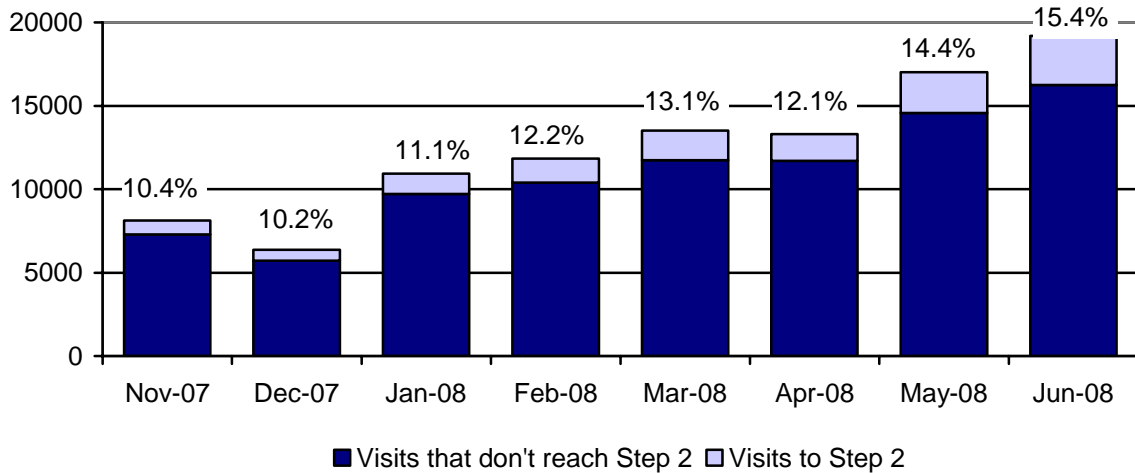
<sup>10</sup> As of October 16, 2008 302 computers have been distributed, applications for an additional 74 terminals are in process, and 169 terminals remain available to be given away. Although the giveaway has been expanded to include city agencies a majority of the current recipients are nonprofit organizations. In addition to reopening the giveaway, the application was revised to include a form. It seems likely that the dramatic increase in interest is due to the improved application form as well as the timing (i.e. fall vs. summer).

<sup>11</sup> As of August 28<sup>th</sup> accounts no longer expire.



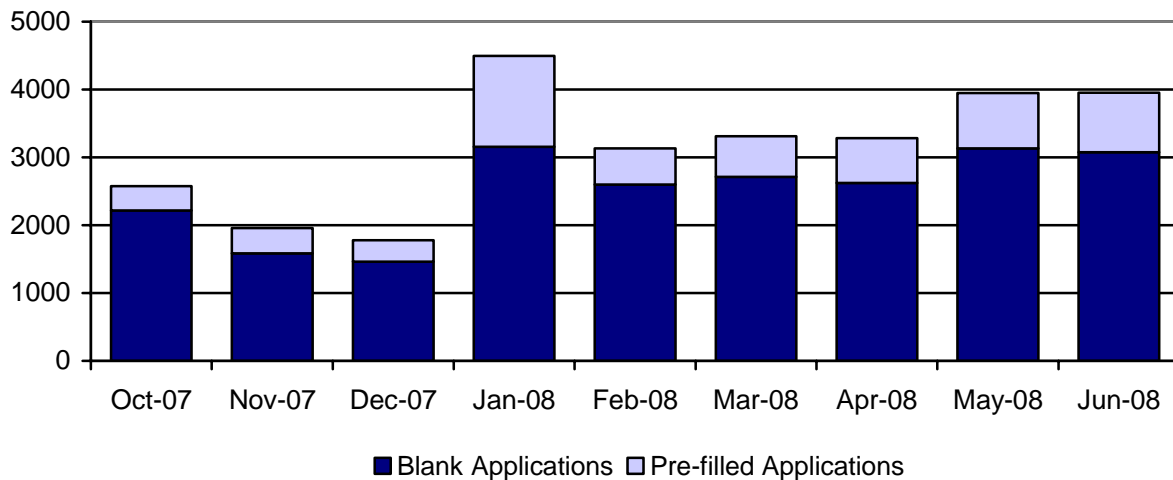
shown in Figure 2, from February to June there was an increase in visitors to step 2 in every month except April. Note that every visit to step 2 is also a visit to the site as a whole. The percentage of step 2 visits is presented above each bar.

**Figure 2. ACCESS NYC: Visitors and Visitors to Step 2 by Month**



The number of applications printed from October to June is presented in Figure 3, where the top part of the stacked bar represents pre-filled applications, and the bottom part represents blank applications.

**Figure 3: Applications Printed October 2007 – June 2008**

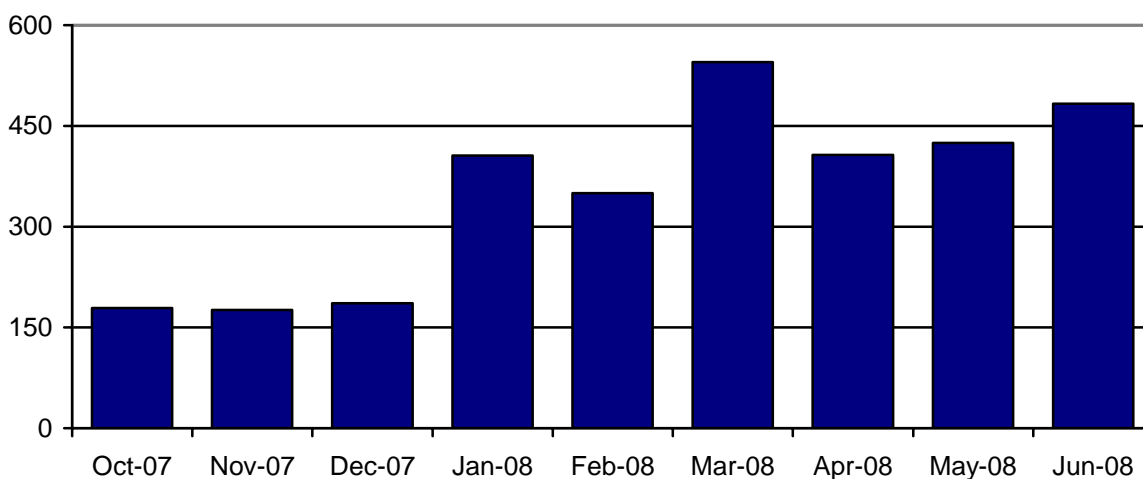


The number of pre-filled applications compared to the number of blank applications is of interest because it means that a client used the screening tool to pre-fill the application. Therefore, a positive outcome would be that the proportion of pre-filled applications would rise, compared to the printing of blank applications. As we can see from Figure 3, the overall number of applications

spiked in January (which might have a seasonal explanation) and rose again in May (which might be related to the marketing campaign). The percentage of all applications that were pre-filled also spiked in January (up to 30 percent of all applications).

Figure 4 shows the increasing trend in the number of accounts created on the ACCESS NYC website from October to June. Creating an account indicates a user's commitment to the site and that the user is using it on an ongoing basis. However, given the large numbers of trainings that have been conducted by the team with case-managers, counselors, and social workers, it is not clear whether the user is the person being screened for benefits, or someone assisting them. Case managers who work with multiple clients on an ongoing basis would certainly have an incentive to use this feature, even though it is not possible to create one account with access to multiple clients.

**Figure 4: Accounts Created October 2007 – June 2008**



**Provider Capacity.** Provider capacity for this program can be considered along three dimensions: staffing, budget, and a demonstrated capacity to monitor performance data. A five-person team handles the ACCESS NYC Outreach and Marketing initiative, and the program director believes that this staffing level is sufficient. The budget was also considered adequate for the program's operations. It should be noted that given the length of time it took for the design to be approved, only one round of material printing was possible in fiscal year 2008, and as a result, the program closed the fiscal year with \$124,000 in accruals. Finally, the program has a strong framework in place for collecting and reporting monthly performance monitoring data. However, the Outreach and Marketing team acknowledges that there were difficulties in collecting some data from the Tax Prep Plus pilot<sup>12</sup> and the on-site counselors in the early months of the program. Although data discrepancies created some confusion, they were corrected in subsequent reporting, after they were discovered.

**Agency Management.** Although management within the ACCESS NYC Outreach and Marketing program has been consistent over the life of the project, oversight has evolved. Oversight initially

<sup>12</sup> Discrepancies could come from clerical error from any of 12 sites reporting data, in-house data entry errors, or reporting lags (often it took OFE 2-3 weeks to get weekly reports from busy sites). Any errors discovered were immediately reconciled with sites' records.

came from the Office of the Deputy Mayor for Health and Human Services (DMHHS) and the Department of Information Technology and Telecommunications (DoITT), with funding to provide training and outreach coming from CEO. DMHHS has had an ongoing role in establishing goals for the project, and recently ACCESS NYC has come under the jurisdiction of HHS-Connect, the technology-oriented project of the Deputy Mayor for Health and Human Services, to coordinate agency practices to more efficiently provide Health and Human Services to New Yorkers. Through the work of HHS-Connect, ACCESS NYC will be expanded to become a one-stop shop for HHS information and transactions.

**Conclusions.** As implemented, the ACCESS NYC Outreach and Marketing initiative is aligned with the CEO mission and is an important component of the city's broad anti-poverty strategy. The ACCESS NYC Outreach and Marketing initiative emphasizes the power of the website as a comprehensive tool to screen for all major public benefit programs. Although a causal relationship cannot be established, outcome data for this program show promise by indicating steadily increasing use of the website. The more visits there are to the site, the more NYC residents will become aware of the multiple benefits and service programs available to them

### **3. Programmatic Recommendations**

The following recommendations offer some ideas about program activities, but primarily focus on ways to monitor and evaluate program outcomes. It is important to have a framework for evaluating each strategy and the Outreach and Marketing team is already collecting data to support that analysis. Although it would be desirable to compare the efficacy of one strategy to another, the strategies are too different for such comparisons.

Now that there is some experience supporting the use of ACCESS NYC, it is reasonable to set targets for ongoing programs such as trainings. A good target would be to conduct at least as many trainings this year as last year. A quarterly target for average attendance at trainings (also pegged to empirical data) would help to ensure that the team's efforts are reaching a sufficiently large audience. The program has many unexplored avenues for pursuing trainees. For example, they could make better use of their CEO connections to initiatives such as the CBO Outreach program of the Department of Small Business Services.

The ACCESS NYC counselors faced challenges competing with other interests of the organizations in which they were placed, but they showed an ability to introduce clients to ACCESS NYC. The on-site counselors at CBOs might have better success integrating themselves into their host organization if they worked for a single CBO that had multiple sites. The counselor initiative would be well-served if the organization which hosted the counselors played a larger role in administration and invited the Outreach and Marketing team to provide technical assistance similar to their work with HHC, where they helped many hospitals to institutionalize the practice of screening clients with ACCESS NYC. The Outreach and Marketing team should continue to monitor data for each site based on the system they have developed.

The team should continue its work with tax preparers that serve low-income New Yorkers, whether or not the Tax Prep Plus program resumes in 2009. Other such programs exist and could reach many people if they were to institutionalize ACCESS NYC screening. It may be possible to improve on the success of Tax Prep Plus by providing separate counselors trained in benefits screening.

Providing terminals for clients to self-screen while at the tax preparation site could also be a cost-efficient way to leverage these programs to bring ACCESS NYC screening to the target population.

An important development in the first year of outreach and marketing was the ability of the team to provide technical assistance and support for an organization to institutionalize ACCESS NYC screening as a part of its operations. In some cases this work came as a direct result of the promotional efforts of the team. Annual targets could be established for continuing this practice. In addition to measuring the number of these training relationships, the program could consider the size of the organizations involved and their level of implementation. If the organizations they work with are interested in monitoring the use of ACCESS NYC, the Outreach and Marketing team could help them to implement the same reporting tools that they have used with the on-site and Tax Prep Plus counselors.

Going forward, site-usage data will be especially important for monitoring the effect of future large-scale marketing activities. The outreach team has discussed ways for monitoring the effect of these activities. In addition to reporting monthly statistics, the program could look at daily and weekly changes in site usage around major events (such as the debut of the subway-car posters) and look at changes in the share of evening versus workday site usage. The team could develop a data plan that lists these and other metrics that could be incorporated into the monthly reports to CEO.