10 Years In The Making

Ideate

Incubate

Launch

Step Up Silicon Valley
Step Up Silicon Valley Team

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Marcos Herrera, Community Leader
Siobhan Kenney, Executive Director, Applied Materials Foundation
Greg, Kepferle, CEO, Catholic Charities of Santa Clara County
Almaz Negash, Senior Managing Director, Step Up Silicon Valley
Prof. William Sundstrom, Economist, Santa Clara University
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Agnieszka Winkler, The Winkler Group
Introduction

The affluence of Santa Clara County often hides the reality of poverty among us. For ten years, Step Up Silicon Valley has worked both to raise awareness of poverty in Santa Clara County and also to reduce it. Through its vision and mission—expressed in innovative and effective programs and initiatives—it seeks to create a thriving community for all the people of Santa Clara County by helping those who face financial, employment, educational, housing, food and health care challenges to step up out of poverty.

In the following pages, we invite you to learn more about Step Up Silicon Valley—its history, people, projects, and initiatives as well as its struggles, triumphs, and hopes for the future. We’ll share our vision and mission as well as the innovative programs, initiatives, and other forms of outreach through which that vision and mission become reality. In addition to program information and “spotlight” comments by special people, we’ll offer a guide that can be used by other organizations and communities that seek to cut poverty and facilitate thriving communities. Whether you are a partner, funder, concerned community member, governmental official, nonprofit organization, or business seeking to reduce poverty in your community, we hope that, by learning more about Step Up Silicon Valley, you will find inspiration, resources, and hope.

Almaz Negash,
Senior Managing Director
Step Up Silicon Valley

Our vision is to reduce poverty and to increase economic opportunities for low-income people in Santa Clara County. We are committed to creating a community that is thriving and self-sufficient—a community where everyone has access to affordable health care, sufficient nutritious food, decent affordable housing, meaningful educational and career opportunities, and reliable income that meets their basic financial needs.

Our mission is to transform community awareness and generate the political will to create systems change that enables individuals and families to step up and out of poverty in Santa Clara County.
Who We Are

Step Up Silicon Valley, under the auspices of Catholic Charities of Santa Clara County, is a network of individuals, nonprofit organizations, and public and private sector leaders focused on both increasing awareness of and reducing poverty in Santa Clara County. Drawing on our diverse experience and expertise in business, education, health care, nonprofit organizations, and government agencies as well as our concern for people living in poverty and our desire to create a thriving community for all the people of Santa Clara County, we seek to create innovative and effective solutions to help people move out of poverty. We often refer to Step Up Silicon Valley as a “social innovation network,” which means that together we struggle with difficult social problems—such as un- and underemployment as well as inadequate food, housing, education, and health care—and seek to find new and effective ways of addressing and alleviating poverty by transforming ineffective systems—those that do not help the people they aim to serve—into systems that do.

*For a complete list of Step Up Silicon Valley network members, see page 39.

What we do

In short, at Step Up Silicon Valley, we collaborate, we strategize, and we act. Together we seek to find new and more effective ways to deal with the realities of poverty and then implement them through a multifaceted outreach of projects and initiatives.

A Foundation of Collaboration

First, we recognize that to reach our goal of poverty reduction, we must cultivate successful community partnerships—not only with the entities that are part of the Step Up network but also with the people we seek to serve. We interact with community members who live in poverty to learn what their needs are and what barriers they face that keep them stuck in poverty. We then provide opportunities for them to reach self-sufficiency through programs coordinated by local service providers, employers, educators, and others who, by working together, can more effectively utilize their resources to aid those most affected by poverty.

Three Innovative Strategies to Combat Poverty

Step Up Silicon Valley, however, does much more than simply encourage collaboration. We engage network members in the challenging task of developing innovative strategies for combating poverty and building self-sufficiency. Our three primary strategies are convening, advocating, and incubating systems change.
Our History

Background

When Hurricane Katrina ripped through the Gulf Coast August 23–31, 2005, Americans woke to the shocking news of over twelve hundred people dead and one million people displaced, and images of thousands of people devastated by the disaster filling their television screens. What soon became evident was that the disaster survivors who were hardest hit were mostly poor. Poverty in the land of affluence once again made headline news.

Several months later, in February 2006, the Daughters of Charity: Province of the West convened a summit on poverty at the University of Southern California. Inspired by the vision of ending poverty the conference presented, Gregory Kepferle, CEO of Catholic Charities of Santa Clara County, committed to align the work of his local agency with this vision.

Kepferle asked himself the driving question: “What will revolutionize how we care for the poor and needy, how we form community to care for one another, and how those who are poor and needy can get what they need to improve their lives with dignity?”

In response to the human-made disaster of growing national poverty, Catholic Charities USA, led by its president, Father Larry Snyder, began a series of conversations with its member agencies on how to respond, drafted a policy paper called “Poverty in America: A Threat to the Common Good” in 2006, and on January 10, 2007, launched a national campaign to reduce poverty in America.
Phase I: 2007–2010

In early 2007, Catholic Charities of Santa Clara County convened a meeting of representatives of local non-profits, social service agencies, businesses, faith-based organizations, governments and academic institutions to discuss how to cut poverty in Santa Clara County in innovative ways that adequately tackle the complex issues which create poverty. The idea of a collaborative network and the Campaign to Cut Poverty in Santa Clara County in Half by 2020 emerged from those discussions.

The first year, 2007, was spent building a coalition of ninety organizations, developing committees around key policy areas, and creating an identity. Having learned of a similar initiative in Savannah, Georgia, Chris Block suggested adopting their name. The board of Step Up Savannah granted permission, so in a meeting on December 18, 2007, the coalition approved adopting the name Step Up Silicon Valley. The coalition chose the name as both a call to action, for the community to “step up” to fight poverty, and as an encouragement for people in poverty to be able to “step up and out” of poverty.

Over the course of the next fifteen months, Step Up Silicon Valley refined its advocacy agenda, initiated activities to increase the community’s awareness of poverty in the valley, and began exploring the development of pilot projects to test innovative solutions to poverty.

Funding for the Campaign to Cut Poverty came from a Community Service Block Grant secured in 2008 through a collaboration between Catholic Charities and Sacred Heart Community Services, the local Community Action Agency led by Poncho Guevara, Executive Director. The funding received from Sacred Heart Community Service propelled Step Up Silicon Valley to develop the first phase of community engagement and advocacy work.

Policy working groups focused on food, housing, education, health care, income, assets, and immigration issues, and established policy goals and metrics to improve conditions in each of these areas by 2020. Measurement of success for clients was based on the SAFE model, a three-point self-sufficiency measure (at risk, stable, thriving) using fourteen domains for client progress out of poverty, developed earlier by Catholic Charities with funding from the Sobrato Family Foundation. Separate task forces convened around advocacy, awareness, partnerships, integrated services, and funding. To coordinate efforts among the task forces, the coalition formed a steering committee composed of the chairs of the various task forces.

The Awareness Task Force sent members from Catholic Charities and Sacred Heart Community Service to the Community Action Agency in Columbia, Missouri, to be trained in conducting Community Action Poverty Simulations. Step Up Silicon Valley held the first local Poverty Simulation at St. Theresa’s Parish in San José, and has held regular awareness experiences for thousands of participants from universities, schools, congregations, and business and civic groups.
By April 2009, Step Up Silicon Valley, led by Terrie Iacino, was ready to publicly launch its ambitious policy agenda, and issued an action plan report titled “First Steps to Cutting Poverty in Half by 2020.” The launch at San José City Hall included public officials, corporate leaders, faith leaders and community members participating in a Poverty Simulation.

The first anti-poverty pilot incubated by Step Up in 2009 was a place-based initiative in the Santee Neighborhood of East San Jose focusing on a single neighborhood and school with a community and academic support strategy to help every child succeed from cradle to career. This became what is today the Franklin-McKinley Children’s Initiative.

The second strategy was focused on advocacy promoting innovative solutions to poverty. In 2010 Catholic Charities USA drafted federal legislation called the National Opportunity and Community Renewal Act which created the framework for much of the local innovations adopted by Step Up Silicon Valley.

Read More on Appendix Page 24-27.

**Phase II: 2011–2017**

After a thorough assessment and a 360 degree analysis by an outside consultant, the Step Up Silicon Valley committee agreed that it was time to bring a new leadership to turn ideas into actions. In late 2010 Step Up Silicon Valley took a step towards being a more effective organization by hiring Almaz Negash to write the business and sustainability plans. The first responsibility given to Almaz was to review the organization’s documentation and to meet with stakeholders develop the business plan and the metrics that provide accountability to the organization’s funders as well as provide internal benchmarks of best practices.

The insight received from various stakeholders and committee members helped shape the second phase of Step Up Silicon Valley (2010-2017). It helped us focus on three strategic areas: Convening – Advocacy – Systems Change Incubation.

Step Up Silicon Valley augmented its collaborative efforts with community leaders throughout Santa Clara County to increase awareness of local poverty and generate the political will to catalyze systems change that enables individuals and families to step up and out of poverty. Step Up Silicon Valley has grown as a network of stakeholders from diverse sectors across the County who challenge the status quo and co-create innovative approaches with measurable impact for our most vulnerable community members. Through convening, advocacy, and systems change incubation, Step Up Silicon Valley has paved the way for disruption to lead to lasting solutions made possible through community action.
Step Up is not the whole answer to ending poverty, but an integral part of the solution. We represent a collaborative model that serves as a conduit between residents who live in poverty and other community stakeholders, enabling them to work together to improve the quality of life for those most in need.

Our strategies coordinate breakthrough systems change that allows us to holistically create a thriving community in which none are too poor to give or too wealthy to be in need, and where everyone has access to affordable health care, sufficient nutritious food, decent affordable housing, meaningful educational and career opportunities, and reliable income that meets their basic financial needs. The deliverables of the past eight years comprise projects sustained in partnership with community leaders:

- Nonprofit Data Integration
- 1000 Out of Poverty
- San José Business Tax Reform
- Pay for Success
- College Savings Circles
- Franklin-McKinley Children’s Initiative and Franklin-McKinley Women’s Initiative

Our work, impact, and strategies are a testament to the importance of collaboration and the participation of the larger community. Our committed partners and funders shine through as they represent the very essence of Step Up Silicon Valley in making this work possible. SUSV also depends on the incredible passion and dogged determination of the staff of many organizations providing service delivery in the field with clients every day. Their daily contributions are immeasurable. Our success requires leadership not just across sectors; it requires leadership deep within sectors, communities and neighborhoods.

**Networked Leadership**

Meanwhile, the role of American Leadership Forum (ALF) in developing “networked leadership” among the members helped the evolution of Step Up Silicon Valley. Bringing relationships among unlikely allies in business, government, nonprofit, labor, and faith communities, ALF also helped facilitate the group processes and planning through monthly meetings and an overnight retreat. The relationships developed through ALF enabled the first corporate Poverty Simulation held at Cisco, and helped launch the first cohort of agencies working together on the 1000 Out of Poverty pilot.
Similar to Step Up’s Phase I “awareness” component, which sought to inform the community concerning local poverty, the strategy of convening seeks to educate the community. Now, however, in Phase II we place a greater emphasis on educating the community about the reality and complexity of poverty, along with the programs and initiatives aimed at reducing poverty (for example, the College Savings Circle, page 12.) Through our convening strategy, we foster collaboration and enable our diverse network members to share their knowledge. Several avenues express the convening strategy:

**Community Action Poverty Simulation (CAPS):**
Originally a program of the Missouri Community Action Network, Step Up adopted Community Action Poverty Simulations (CAPS) as a unique educational tool for promoting community awareness of the everyday challenges of poverty. During the simulation, participants form families that work together to overcome barriers to social services, live off insufficient income (e.g., $2000/month for a family of four), and encounter unforeseen economic obstacles along the way.

Poverty Simulations have successfully fostered empathy among people of various ages, backgrounds, ethnicities, faith orientations, and economic standing by respectfully encouraging and facilitating interaction between community members who have not experienced poverty and others who have. Through a role-reversal role-play followed by intense personal dialogue, participants experience viscerally the challenges and frustrations of surviving with limited means in a complex and bureaucratic system. This in turn encourages participants to action, including advocacy for policy changes. Eight hundred to one thousand people participate in CAPS each year, with 10% reporting that, after participating in the Poverty Simulation, they now actively engage in service to the poor, such as volunteering at a local nonprofit or helping to feed the homeless.

**Learning and Development Series (L&D):**
The Learning and Development Series seeks to deepen dialogue on key community issues and problems (such as access to education, health care, employment, food, and housing) and to offer a platform for discussing and co-creating innovative, research-based solutions to those problems. Workshops feature leading experts in their fields who share their latest research on poverty, social innovation, and “outcomes measurement” (the determination and evaluation of results of an activity, plan, process, or program, followed by the comparison of the actual results with the intended or projected results). Sponsored by the Leavey School of Business of Santa Clara University, the L&D Series has engaged twelve speakers since March 2013, resulting in two major projects: San José Business Tax Reform (page 31) and the College Savings Circle (page 13).
Social Innovation Leadership Forum (SILF): 
Through its annual Social Innovation Leadership Forum, Step Up Silicon Valley encourages greater dialogue among social entrepreneurs, thinkers, and leaders from nonprofit organizations, business, government, community organizations, and education who seek to create and implement feasible solutions to the problems of local poverty. SILF began in 2012 in partnership with San José State University and has led to creative partnerships such as the Franklin-McKinley Women’s Initiative (FMWI, page 14) and the Marketing Smarts Program at San José State University (page 26). Over two hundred participants have worked together to build and strengthen social innovation in relation to the issues of local poverty. For the list of the SILF founding committee, please see appendix page 39.

Advocating: Institutional and Policy Change

In its second strategy, Step Up Silicon Valley advocates policy and institutional changes that directly cut poverty and enable families and individuals to become self-sufficient. In short, we seek to dismantle inefficient and ineffective systems and institutional barriers that prevent the creation a thriving community that benefits all the people of Santa Clara County. We promote effective social policy, support community organizing, and work with local, state, and federal policy makers and elected officials. We advocate for policies that:

- promote more efficient use of technology
- develop locally controlled solutions to local problems
- revise the baseline measurement of the poverty level to reflect the high cost of living in Santa Clara County
- strengthen nutrition assistance programs
- increase access to affordable health care and housing
- promote greater economic security for the poor and vulnerable
- increase educational and employment opportunities to help low-income families
- increase economic opportunity for those living in poverty in Santa Clara County

More specifically, Step Up Silicon Valley has acted in coalition with other organizations, supporting and advocating for a number of policy issues that directly impact people living in poverty in Santa Clara County.

For the full list of policy issues, please see appendix page 31.

Incubating Systems Change: The Innovative Poverty Laboratory

The third strategy, incubating systems change, places Catholic Charities of Santa Clara County and Step Up Silicon Valley at the forefront of social innovation as a “poverty laboratory.” This “laboratory” generates and develops new ideas for preventing, reducing, or alleviating poverty, then tests those ideas by putting them in action in the community.

Systems change incubation is the key strength of Step Up Silicon Valley. We are best known in the community and by the County of Santa Clara as the incubator of and catalyst for initiatives such as Pay for Success (page 16), 1000 Out of Poverty (page 15), the Franklin-McKinley Children’s Initiative (page 14, and the College Savings Circle (page 13).
Guiding Principles for Incubating Systems Change

Each of the initiatives of Step Up Silicon Valley is guided by the policy principles developed by Catholic Charities USA’s National Opportunity and Community Renewal Act (page 25; see also https://www.scribd.com/document/217711671/CCUSA-NOCRA-Principles-and-Pilot-Sites-Presentation). They are (1) results driven, (2) market based, and (3) systems changing. A local Outcomes Leadership Council oversees the implementation of these strategies. Let’s take a brief look at each of these principles:

1. Results Driven
   The focus is on outcomes rather than outputs and includes evaluation of client outcomes as integral part of the plan. An example of this principle in action is the measurement of results of the 1000 Out of Poverty pilot project (page 14). The four participating organizations collect client outcomes data using a common tool called the Self-Sufficiency Measure (page 31), which measures improvements in access to food, housing, health care, education, and income growth for one thousand clients.

2. Market Based
   The corporate sector is engaged by becoming investors in reducing poverty, monetizing savings, and reinvesting in the community. Step Up launched a local Pay for Success (page 15) initiative in Santa Clara County. The County of Santa Clara is the first county in California to fund this model with help from local foundations and technical assistance from Third Sector Capital Partners. It tests ways to create market incentives for the private sector to invest in a public good based on efficiencies and results created by nonprofit providers in addressing high-cost social challenges such as homelessness, mental illness, and incarceration.

3. Systems Changing
   These are holistic approaches to addressing poverty with the clients driving the change. The best example of this is the Franklin-McKinley Children’s Initiative (page 13). The mothers in the neighborhood are the leaders of neighborhood and school change, with support from the government, school, and nonprofit sectors. It’s holistic in approaching the entire cradle-to-career pathway to academic and financial success; this includes early childhood development, neighborhood safety, and economic opportunities for families.

What Is a “Thriving” Community?

A thriving community is one in which none is too poor to give nor too wealthy to be in need, and where everyone has access to affordable health care, sufficient nutritious food, decent affordable housing, meaningful educational and career opportunities, and reliable income that meets basic financial needs.
Projects and Initiatives

Our collaboration and strategizing lead us to action. Through our projects and initiatives, we respond to the needs of the poor in our community. In concrete ways, we explore innovative approaches to helping people step up and out of poverty. By putting theory into practice and measuring the results, we learn what works—and what doesn’t. That feedback enables us to continue innovating, seeking the most effective means to reduce poverty in our community. Because of the complexity of poverty, our projects and initiatives are multifaceted, seeking to address the issues of poverty on multiple fronts.

Case Managers Training Program

Case managers stand at the forefront of serving individuals and families. By equipping case managers with the tools they need to help clients navigate complicated support systems, they can more efficiently and effectively further our efforts to reduce, alleviate, and prevent poverty.

In working with clients in the 1000 Out of Poverty Program (page 15) and in other outreach programs, case managers articulated specific challenges that they faced when trying to help clients. To mitigate these challenges, in May 2017 Step Up Silicon Valley launched its Case Managers Training Program, a three-part series designed to provide case managers with the tools they need to effectively serve their clients. Each part of the training builds on the previous presentation, and case managers are encouraged to attend all three sessions: (1) *The Rules of Engagement: How to Help People in Poverty Become More Engaged with Your Program and Its Services*, (2) *How You Can Be a Change Agent: How to Increase Motivation to Change in the People You Serve*, and (3) *It Takes a Village: How to Develop a Seamless and Powerful Referral System to Help People Succeed*.

College Savings Circle

The Step Up Silicon Valley network first ideated the Kids College Savings account at its October 2013 Annual Retreat. Dana Bunnett of Kids in Common championed the initiative, with the group meeting regularly to push the initiative forward. The initiative gained momentum after Professor Jeffrey Ashe of the Carsey School of Public Policy presented his research on how savings groups are revolutionizing development at our November 2014 Learning and Development Series. Step Up convened a small committee to discuss the possibility of creating and incubating a savings circle specifically for children’s college savings.

Today, Silicon Valley Education Foundation (SVEF) houses the College Savings Circle project under the leadership of Manny Barbara. On March 21, 2016, SVEF began community outreach and education efforts for the initiative by inviting families in the San José neighborhood of Edenvale to learn more about the program. The goal is to increase educational opportunities and to instill a college mindset for families in the East Side Alliance through saving for college.

“Savings circles have the potential to be a powerful change initiative to improve the financial situation of the poor in Silicon Valley. They can be an innovative solution where solutions are few and far between.”

— Manny Barbara, Interim CEO
Silicon Valley Education Foundation
Franklin-McKinley Children’s Initiative (FMCI)
The Franklin-McKinley Children’s Initiative (FMCI) is a community partnership that supports children from cradle to career through community schools, safe and strong neighborhoods, and economic development. Based in the Santee community of East San José, FMCI is a “place-based initiative,” which grows out of the idea that families do better when they have strong and consistent support within their community—their “place.” While rich in diversity of ethnicity, race, income, and leadership, the community and its schools face many obstacles and a lack of resources. As they recognized these challenges, a group of residents, service providers, and community partners came together in 2009 to form the Franklin-McKinley Children’s Initiative (see Phase I: 2007–2010, page 24). Together the residents, the schools, police, City of San José, the County, First Five, and nonprofits work to improve educational outcomes, strengthen families, reduce crime and poverty and create a strong, thriving community.

Franklin-McKinley Women’s Initiative (FMWI)
The Franklin-McKinley Women’s Initiative (FMWI) is an innovative pilot program designed to help low-income women to develop the skills and receive the training needed to start their own businesses. The idea for the initiative came from thirty-one women from the Santee neighborhood of East San José who wished to gain economic self-sufficiency in order to better support their families and community. In partnership with the Franklin-McKinley Children’s Initiative, Step Up Silicon Valley and the Women’s Initiative for Self-Employment developed an eleven-week course for small business development. The thirty-one women who had the initial idea participated in the program. As a result, eight women started businesses in childcare, house cleaning, and food catering. FMWI was assisted by the San José State University Marketing Smarts program, which helped the women develop an awareness and knowledge of how to market their business ventures.

“I had some doubts, but there is no trouble because the [microenterprise] class explains it to us. I went to a meeting with the counselors and they gave us flyers that explained step by step what licenses I need to start. As a business owner, I am the owner of my own time.”

— Lourdes Cortes, Business Owner

31 women participated in the program
8 women started their own small business
Nonprofit Data Integration Project

The Nonprofit Data Integration Project is developing a technology solution to an ongoing problem that both clients seeking help from multiple agencies and the social service providers frequently encounter—that is, clients need to share their information multiple times to get help and service providers either have to enter data twice on different systems to get funded or they are unable to share client data because the agencies use different, incompatible types of client-tracking software (often even within one agency). The goal of the project is threefold: (1) to require clients to share basic information only once, (2) to enable providers to enter data only once using their existing database, and (3) allow them to view client reports from multiple providers within a secure system. Each provider sends data directly from their unique client-tracking software to a single, shared data warehouse, or “hub.” After developing data-sharing agreements, agencies access and share up-to-date files on mutual clients from the hub. This enables them to view aggregate data, better facilitate and coordinate client care among agencies, as well as to more accurately track the outcome of that care, while reducing double data entry by case managers. Because of the need for confidentiality, client permission is required for identifiable data sharing. Also, access is limited as necessary, as is the transmission of information from each agency’s individual database. The project is currently focusing on the clients in the 1000 Out of Poverty (see below) for the pilot.

1000 Out of Poverty

This project seeks to coordinate multiagency efforts to provide services to unemployed yet employable adults to help them move out of poverty. The partner agencies include Catholic Charities of Santa Clara County, Next Door Solutions to Domestic Violence, the Stride Center, and the Bill Wilson Center. The focus is not only on poverty alleviation but also on poverty reduction, and the coalition will test the best strategies to reach our goal of moving one thousand people out of poverty by 2020.

The agencies use a common tool called the Self-Sufficiency Measure (SSM; page 17), which focuses on five main issues: income, education, housing, food, and health care to measure client progress in addressing their well-being.

Over the past few years, through our work with the 1000 Out of Poverty partners, case managers, and community leaders, we have learned valuable lessons not only about the opportunities for lifting people out of poverty but also the challenges in doing that. These challenges range from strict eligibility criteria by funders for referrals and for the type of services to be provided, and the overall complexity of poverty that clients and service providers face on a day-to-day basis. To assist them, Step Up developed a case manager training program designed to provide the service providers the resources they needed to serve clients more effectively. (See Case Managers Training Program, page 13).

“\nOur typical client is working with several organizations on their journey to a better life. Integrated, multi-organizational data is a strategic tool that will dramatically enhance client experiences and success rate.

—Steven Hunt, Deputy Executive Director of The Stride Center

“\nTalia’s story is one of survival. She and her two teenagers survived physical, psychological, and sexual violence at the hands of her former partner. Talia was referred to Next Door Solutions through the Rapid Re-Housing partnership that includes Next Door Solutions and the Bill Wilson Center. Through this partnership and our partnership with 1000 Out of Poverty, Next Door Solutions and the Bill Wilson Center have developed a relationship that allows for a personal connection between case managers and administrators.

—Susan McInnis, Director of Finance and Operations Next Door Solutions to Domestic Violence
Pay for Success (PFS)

Pay for Success is performance-based contracting between government entities and service providers in which funds are allocated based on successful outcomes rather than on the number of services provided. Private investors provide the initial investment and then receive a return on their investment based on the savings in public funds created by the success of nonprofits in addressing the social need more effectively and efficiently. The idea, which originated earlier in England, was first introduced by Step Up Silicon Valley to the County of Santa Clara as a way to test and finance market-based solutions to poverty. This has since developed into the first two county-based Pay for Success projects in California, led by the County of Santa Clara. One project addresses chronic homelessness and the other acute mental illness.

The local Pay for Success was the result of a multi-year exploration by Step Up Silicon Valley of how to implement the principle of market-driven solutions to poverty. The Outcomes Leadership Council of Step Up Silicon Valley began to identify and pursue anti-poverty strategies based on a set of principles derived from NOCRA (page 25). This included a commitment to rigorous and measurable outcomes and an exploration of market-driven strategies that could engage private sector partners and funds.

Project Welcome Home

$6.9 M
for social innovation financing for Chronic Homelessness

On March 2, 2012, Step Up Silicon Valley convened a gathering of nonprofit, government, and private sector leaders to discuss privately funded performance-based financing for social good, often called “social impact bonds.” Co-hosted by the Silicon Valley Community Foundation, the Silicon Valley Council of Nonprofits, and Working Partnerships USA, participants learned about different models of social finance, from “human capital performance bonds” presented by keynote speaker Steven Rothschild of Invest in Outcomes, to other models discussed by presenters from the Nonprofit Finance Fund, SV2, Working Partnerships USA, the Corporation for Supportive Housing, and the Housing Trust – Silicon Valley. Out of this meeting, the City of San José committed $10,000 and The Health Trust later granted $150,000 as a “disruptive innovation grant” to Catholic Charities’ Step Up Silicon Valley. After a search for experts in crafting social impact investment deals with government agencies, Step Up Silicon Valley engaged Third Sector Capital Partners, a startup in the emerging field of Pay for Success contracting, to conduct a feasibility study. With the leadership of County Board of Supervisors President Dave Cortese, and after extensive meetings with county executives, and advocacy with the Board of Supervisors, on August 27, 2013, the Santa Clara County Board of Supervisors unanimously approved the Pay for Success proposal with pilot areas focusing on chronic homelessness and mental illness. Step Up played a key role throughout the process by leading the advocacy, community engagement and education efforts.

In June 2015, the Santa Clara County Board of Supervisors unanimously approved $6.9 million in financing over a six-year period for Pay for Success for Chronic Homelessness: Project Welcome Home, in order to provide housing for 150 to 200 homeless individuals in Santa Clara County. As the lead agency of the project, Abode Services provides housing and other supportive services to reduce chronic homelessness in the county.

In August 2015, the Santa Clara County Board of Supervisors approved the selection of Telecare Corporation as the service provider for the second project: Pay for Success for Acute Mental Illness: Partners in Wellness. The Partners in Wellness project will receive funding from the county through two agreements: a $16.9 million clinical services agreement and the $11.2 million Pay for Success agreement.
How We Measure Progress

Since its founding, Step Up Silicon Valley has taken a measurement-based approach in monitoring and evaluating its social impact. Our initial measurement system gauged the progress made in our three strategic focus areas: awareness (people reached), advocacy (policies changed collaboratively with local, regional, state, and national policy makers), and incubation (systems change initiatives launched). Currently, Step Up is measuring the social impact of the 1000 Out of Poverty Project. Other projects incubated by Step Up are measured by the agencies that oversee them.

**Step Up Self-Sufficiency Measure**

In 2011, Step Up adapted an issue-specific measurement known as the Self-Sufficiency Measure (SSM), which was originally developed by the State of Arizona in a somewhat different form. Step Up’s adaptation addresses the five dimensions of poverty and prosperity: food, housing, health care, education, and income. These five dimensions correspond to the five focus areas originally addressed by the working groups (page 33).

The Step Up Self-Sufficiency Measure serves as a scorecard for tracking the progress of participants in the 1000 Out of Poverty Project. The degree of access each individual has to each of the five categories (income, education, housing, food, and health care) is described on a scale of 1 to 5, which indicates the progression of poverty to prosperity in three phases: surviving, striving, and thriving. Individuals receiving scores of 1 to 2 (surviving) either lack or struggle to have access to those respective categories. Individuals receiving a 3 (striving) have attained an adequate degree of access to the respective categories, and scores of 4 and 5 (thriving) indicate that individuals are at the most successful stages of achieving self-sufficiency. Our goal is to use employment as a means of empowering adults to enter the thriving stage. (See appendix 2 for more detailed information about the Self-Sufficient Measure.) The four agencies collaborating in the 1000 Out of Poverty Program—Catholic Charities of Santa Clara County, the Bill Wilson Center, Next Door Solutions for Domestic Violence, and the Stride Center—provide a quarterly report on how their clients are faring in the five categories. Some agencies have elected to include other measures both from the original tool from Arizona as well as developing measures relevant to their specific client populations.

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<th>Five Dimensions of Poverty and Prosperity</th>
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What We’ve Learned

For an organization to thrive, it is necessary to honestly assess strengths and weaknesses. Making this assessment is particularly challenging for an organization like Step Up Silicon, which is a network of many different organizations, governmental entities, and individuals.

To facilitate this assessment, Step Up Silicon Valley embarked upon a listening tour to build our existing strengths and improve our processes. Over an eight-week period from February to March 2016, we engaged community leaders and members as well as Catholic Charities staff to examine ourselves internally and externally. Our findings reveal both affirmations of our impact as well as key areas of weakness or needed improvement that will clarify our mission, highlight our core values, and position us as a role model and thought leader on poverty and social innovation. See appendix page 30 for a list of the community members and leaders who were a part of the listening tour.

Our Strengths

Innovation ignites change. At Step Up, we take a creative approach to addressing poverty in Silicon Valley by challenging the status quo of longstanding, ineffective systems with groundbreaking, sustainable solutions. The community generates never-before tested solutions, and then we, along with our team of diverse and committed community partners, turn them into action. As a “poverty lab” that generates new ideas and then incubates them by putting them into action, Step Up sets itself apart from other organizations and does what no other organizations do.

Systems change incubation is the key strength of Step Up Silicon Valley, fueled by our innovative perspective and the support of diverse community stakeholders. We are best known in the community and by the County of Santa Clara as the incubator of and catalyst for projects and initiatives like Pay for Success (page 16), 1000 Out of Poverty (page 15), San José Business Tax Reform (page 32), and the College Savings Circle (page 13). We are also known for our track record of building relationships in the community that produce results, like the Franklin-McKinley Children’s Initiative (page 14) and the Franklin-McKinley Women’s Initiative (page 14). With over ninety community partners engaged from the beginning, Step Up Silicon Valley has been well-aligned for tapping into local resources and building relationships among unlikely players to foster productive collaboration.

Strong organizational support and leadership make Step Up’s groundbreaking approach possible. Our visionary and energetic leadership is supported by a passionate and committed team as well as a stable backbone organization, Catholic Charities of Santa Clara County (CCSCC). The work of Step Up Silicon Valley fits with the agency’s vision, mission, values, and strategic plan, bolstering CCSCC’s position as a social change agent. County officials are familiar with Step Up Silicon Valley’s activity, and we have established a solid reputation for our effectiveness.
Our Weaknesses

Our vision and mission face limitations in light of our current infrastructure. Though supported by its backbone organization, Catholic Charities of Santa Clara County, Step Up is a lean operation, mostly dependent on annual private funding. The small but dedicated staff consists of a managing director, a project coordinator, and two interns who often focus on multiple projects and are stretched thin. Limited capacity consequently means that staff is unable to respond to all needs, for example, urgent advocacy matters. This undercuts our effectiveness. We lack a feedback loop from people living in poverty as well as resources for research and evaluation, follow-up with poverty simulation attendees, criteria for vetting incubation ideas, and a system for advocacy. These gaps weaken our full potential.

Step Up Silicon Valley was not organized to directly manage service projects such as 1000 Out of Poverty, but rather incubate them and spin them off. Key successes such as the Franklin-McKinley Children’s Initiative (page 14), Pay for Success (page 16), and the College Savings Circle (page 13) prove that our energy is most effectively channeled toward incubation and facilitation. Project management can best be sustained by a committed community partner that has participated in the idea-to-action process.

Stakeholder feedback indicated that Step Up also lacked the necessary focus that would increase its capacity. Too many committees created competing priorities, and too many ideas without a vetting system for prioritizing initiatives misplaced the team’s energy. In addition, community partners indicated that meetings occur too often, and that this frequency should be reduced to quarterly meetings. The broad membership of our network also poses its own challenges, as only a small percentage are regularly involved, while overall engagement remains weak. This is true of two of our most valuable and relevant stakeholders—community members who live in poverty and local corporations.

Clear messaging of the identity, role, and function of Step Up has been challenging. Catholic Charities organized Step Up Silicon Valley as a community-based collaborative in response to the national call by Catholic Charities USA to organize efforts to reduce poverty. The identity as a community collaborative and as the social innovation lab...
of Catholic Charities of Santa Clara County is a balancing act that needs more precise articulation. It can be unclear whether our projects are community driven and managed by a partner organization or directed by Catholic Charities. Is Step Up Silicon Valley an anti-poverty laboratory? A social innovation network? A systems change incubator? The research and development function of Catholic Charities? If Step Up is all of the above, what is its “elevator pitch,” in five words or less? How to explain the Step Up approach may also make it difficult for a lay audience to immediately grasp the connection among convening, advocacy, and systems change incubation. Community organizations thrive on trust and familiarity, and garner participation through effective branding, as United Way has successfully done. That said, Step Up requires greater clarity to effectively establish itself as a familiar collaborative that community members want to participate in.

Funding for innovation and incubation is limited. Step Up Silicon Valley faces competition from organizations with similar missions and visions, such as United Way Bay Area and its Rise Together Bay Area, as well as issue-specific organizations that are more financially appealing to grant makers. Funding cuts and internal funding competition with other programs of the backbone organization add an additional layer of complexity to the work of Step Up.

Sustaining community relationships is a constant challenge. Step Up Silicon Valley thrives upon community partnerships, but it is difficult to keep organizations engaged in projects outside of their everyday work when all are pressed to survive. Large-scale collaborations involving numerous people and diverse organizations have proven to be inherently difficult to manage, as challenges with logistics, capacity, or commitment levels may arise. Step Up is also going against the grain by encouraging collaboration in a traditionally competitive social service landscape. Local nonprofits often pursue the same streams of funding, and, thus far, there have been insufficient financial incentives for service agencies to partner in coalitions or shift away from the status quo of simply reporting the output of their efforts vs. the results (the outcomes), for example, the number of people trained in employment vs. jobs created and income earned. While Step Up encourages and facilitates opportunities to engage partners, collaborate, and take an outcomes-oriented approach, awards by the County of Santa Clara and grant-making institutions are currently set up to measure outputs, not outcomes.
What’s Next? Envisioning the Future

Based on its community listening tour (page 18), Step Up Silicon Valley has set out to meet the following objectives within the next five years:

- Establish Catholic Charities of Santa Clara County as a thought leader and role model in developing innovative solutions to poverty.
- Institute a governance body to help with strategic input as well as oversight.
- Strengthen our infrastructure to refine our focus.
- Improve our systems change incubation design project by project.
- Engage the community to create awareness, develop empathy, and take action through the Community Action Poverty Simulation.

Establish Catholic Charities as an Anti-Poverty Thought Leader

Step Up Silicon Valley places Catholic Charities of Santa Clara County at the forefront of social innovation in the nation. We have the potential to establish Catholic Charities as a thought leader in innovative approaches to social change, specifically among the social service and nonprofit organizations. Through our unique approach of creating innovative solutions that challenge and replace ineffective and long-established systems, we can role-model new, effective tactics for change and share lessons learned from our pilot projects and initiatives to guide other organizations on a local and national scale. If our approach is compelling, distinct, and proven to be effective, this will open doors to potential funders who are interested in anti-poverty projects.

Institute a Governance Body

To reach its full potential, the governance must change to support a lean staff and to narrow the focus to a few projects per year. Step Up has the opportunity to strengthen its internal governance structure while bolstering the participation of external partners through the formation of a strategic advisory committee. The Leadership Council can be restructured as a small advisory committee, which is representative of the community we serve, for strategic direction, oversight, and advocacy support. This new body will help staff and volunteers to engage with and immerse community members in public policy change efforts, serve as a resource and liaison to the community, and offer their own understanding of community needs and propose public policies that address those needs.

The advisory committee also can design and implement incubation criteria to approve innovation projects. This would focus efforts on a few initiatives with greater potential for success.
Strengthen Our Infrastructure

Step Up Silicon Valley has gained traction with broad community support and seed funding from several local corporations and foundations including Intel, Applied Materials, Cisco, the Health Trust, and the Law Foundation of Silicon Valley, as well as government support from the City of San José. The generosity of these funders has enabled Step Up to launch specific projects. At the same time, additional ongoing funding is required both to hold the network together and to broaden the work of the poverty lab. That funding would enable the lab to provide necessary research and development as well as to support the advocacy needed to truly cut poverty in Santa Clara County.

Specifically, funding is needed to sustain existing anti-poverty strategies of convening, advocacy, and systems change incubation and to widen the focus of the poverty lab. This widened focus would include data collection and evaluation of the innovative initiatives being tested as well as research and advocacy for public policies that implement the systems-changing solutions being tested. As this is accomplished, we expect these results:

• increased awareness by community members of the realities of poverty and solutions to poverty;
• policy changes at the city and county levels that in turn can influence state and federal policies;
• implementation and expansion of the current pilots like the 1000 Out of Poverty and Pay for Success innovation strategies;
• increased knowledge through research on what works and what doesn’t in implementing the anti-poverty pilots; and
• a sustainable network of providers creating collective impact.

Improve Our Systems Change Incubation Design

To facilitate and streamline the work of Step Up, it is crucial that we design and implement incubation criteria to vet prospective incubation projects. Doing so will enable us to more effectively and efficiently select projects that both fit our mission and vision as well as develop our capacity to engage appropriate partners for implementing those projects. In addition, we need to create an action plan to address challenges that may arise in the incubation process (for example, projects that are misaligned with our mission or partners that lack follow-through and/or capacity to carry out the project). Using 1000 Out of Poverty as a prototype within Catholic Charities will enable us to test collaborative processes. It will also serve as a community resource for lessons learned.

We also need to scale the Step Up Self-Sufficiency Measure as a common denominator for measuring client outcomes throughout the county, state, and nation; recruit researchers and evaluators through universities to provide research and evaluation support; and integrate client outcomes data with technology support.

We have much to think about and to do as we envision the future of Step Up Silicon Valley. Our program staff and the whole of Catholic Charities of Santa Clara County as well as our community partners will draw on our mutual commitment to preventing, reducing, and alleviating poverty and build on our rich experience of the first ten years of Step Up Silicon Valley. Though some of the specifics are still evolving, the vision and mission of Catholic Charities will guide us as we continue working toward creating a thriving community for all the people of Santa Clara County.
In Closing: Courage for the Long Haul

Creating systems change is hard work, but it is possible. Challenging poverty itself can seem like jousting at windmills. But even a small team of passionate, smart, committed partners and unlikely allies can make an incredible difference in changing social policy and in finding new approaches to tackling poverty. It’s exciting when you experience the success of a new idea that actually changes lives and discouraging when you experience failure. But as they say here in Silicon Valley, “Fail fast and fail forward.” Keep testing the boundaries and know that you are in this for the long haul. Never give up.

Almaz Negash, Senior Managing Director
Step Up Silicon Valley

Gregory R. Kepferle, CEO
Catholic Charities of Santa Clara County
Appendix 1: Step Up Silicon Valley Timeline

Events Leading Up to Formation of Step Up Silicon Valley

Key:
CCC – Catholic Charities of California
CCSCC – Catholic Charities of Santa Clara County
CCUSA – Catholic Charities USA
SCU – Santa Clara University
SUSV – Step Up Silicon Valley
SHCS – Sacred Heart Community Services

2005: Catholic Charities of Santa Clara County (CCSCC) implements the SAFE model, a three-point self-sufficiency measure (at risk, stable, thriving) using fourteen life domains for client progress out of poverty, with funding from the Sobrato Foundation.

February 2006: Daughters of Charity hold Poverty Summit at University of Southern California.

Spring 2006: CCSCC engages social policy intern Shawn Wehan from Jesuit School of Theology at Berkeley.

June 2006: CCSCC hires Tim Hellman as part-time social policy specialist.

August 2006: Catholic Charities USA (CCUSA) drafts “Poverty in America: An Unnatural Disaster.”

August 2006: CCSCC develops first draft of a strategy to end poverty locally. CCSCC hires part-time social policy staff: Margarita Pagni. It then hires Elizabeth Lilly full-time.

September 2006: CCUSA Annual Gathering discussion groups lead to “Poverty in America: a Threat to the Common Good” white paper.

November 2006: Catholic Charities of California (CCC) drafts white paper on poverty in California.

Phase I: 2007–2010

Members investigated innovative solutions to poverty being proposed in other communities to see which ones could be adopted locally. Catholic Charities CEO Gregory Kepferle met with Professor David Grusky, director of Stanford University’s Center on Poverty and Inequality. Professor Grusky shared a publication from the Center that described the 2008 presidential candidates’ solutions to poverty. Senator Hillary Clinton proposed child savings accounts and Senator Barack Obama proposed neighborhood and school-based “Promise Neighborhoods” modeled after the Harlem Children’s Zone.
Franklin-McKinley Children’s Initiative

The Promise Neighborhood approach to poverty reduction seemed well-suited to the work already being done by several of the nonprofits in local neighborhoods. It proposed a “cradle-to-career” model of intensive family and child supports, high-quality education, and community and economic development block by block. The steering committee reviewed two locations: the Washington-Alma Neighborhood and the Santee Neighborhood in East San José. They chose the Santee Neighborhood because of the strong relationship with the Franklin-McKinley School District, the long-time presence of the Holy Names sisters in the community, and the intense engagement that both Catholic Charities and the City of San José had in the neighborhood and schools. On February 6, 2009, Step Up Silicon Valley members Catholic Charities and the Franklin-McKinley School District held a community meeting to surface needs and resources within the community, and thus began the Franklin-McKinley Children’s Initiative (FMCI). Originally called the Santee-Fair Neighborhood Initiative, and then the Santee Children’s Zone, the collaborative changed its name to Franklin-McKinley Children’s Initiative because of copyright requirements by the Harlem Children Zone. With neighborhood leaders driving the priorities, and under the guidance of its managing partners, Catholic Charities and the Franklin-McKinley School District, FMCI developed its own governance structure, formed local action committees, and recruited founding partners—First Five Santa Clara County, the County Office of Education, the City of San José, the Social Services Agency of Santa Clara County, and other nonprofits. Seed funding was provided by the David and Lucile Packard Foundation, the City of San José’s redevelopment fund, the County Office of Education, First Five and Franklin-McKinley School District. Dr. Susan Meyers, San José State University dean emeritus of education, became the founding director with Elizabeth Alvarez hired as a community organizer.

FMCI leaders along with First Five leaders attended a Promise Neighborhood Conference in New York City and developed the local plan based on the learnings from the conference. But it was the immigrant mothers in the neighborhood who crystallized the work. They demanded that their children be safe going to and from school, that their children receive a quality education, and that the parents have an opportunity to learn English and to work. This led to the launch of the Franklin-McKinley Women’s Initiative (FMWI) out of which neighborhood women created microenterprises. Almaz Negash was able to facilitate the development of FMWI in partnership with Women’s Initiative for Self-Employment, FMCI, and with the support of Dr. Porter, Superintendent emeritus, Franklin-McKinley School District.

Other ideas such as a community center, an early childhood center, a garden, a park, and a place for older youth all have come to fruition over the eight years since the launch of FMCI. The neighborhood crime rate has dropped, neighbors are more engaged, adults are learning English and getting jobs, education scores have improved, a community garden grows fresh vegetables, and a play structure entertains children. Best of all, Educare California at Silicon Valley built a state-of-the-art early learning and child and family development center in the heart of Santee. While the community still faces housing challenges, this one collaborative strategy to reduce poverty and improve education block by block has worked and is now being replicated in the Seven Trees Neighborhood of San José.
Marketing Smarts Program at San José State University

Professors: Dr. Easter (AKA: Dr. E) and Dr. Bobbi Makani
Class Days/Time: Wednesday 3:00 PM- 5:45 PM
Classroom: BBC 324
Office Location and Hours: Tuesday in BT 763 4:30 PM to 5:30 PM or WebEx by

Program Description:
The Marketing Smarts program is designed to address the need to empower women of the Franklin McKinley Women’s Initiative (FMWI) by developing an awareness and knowledge of how to market their existing ventures. The program seeks to develop the women’s ability to pursue their own personal economic development so that they can create a better live for themselves and their families. The program involves having student teams from the Integrated Marketing Communications of the College of Business in San Jose State University acting as consultants to the women entrepreneurs to identify the marketing communication needs for each business, and then develop a complete marketing communications plan to strengthen the market presence of the business.

Through service learning components, students engage their clients – the women entrepreneurs – and get to know their business. An extensive market analysis is done to further define the business position, competition, and the target market of the women’s businesses. From this engagement, students will produce a comprehensive marketing communications plan that would help the women better communicate the value of their business to their target audience. Elements included in the integrated marketing communications plan include print collateral and promotional items, as well as a set of marketing communications strategies to help the entrepreneurs establish their identity in the marketplace. The value of the Marketing Smarts program lies beyond the actual integrated marketing communications plan. From the academic perspective, students get immersed in experiential learning while serving the community and this gives them the opportunity to practically apply what they have learned in class. For the participating women entrepreneurs, this partnership presents an array of beneficial and useful outcomes for their businesses as well as their own personal development.

Selection Criteria:
1. Participants in the program should already have a business established (either a product or service)
2. Participants should agree to communicate and collaborate with the students, and disclose information about themselves and their businesses.

Time Commitment:
1. Participants should be willing to come to SJSU campus and McKinley Neighborhood Center to meet the students on these dates:
   a. September 4th (Wednesday) @ 3pm (SJSU)
   b. October 2nd (Wednesday) @ 3pm (McKinley Center - online)
   c. October 23rd (Wednesday) @ 3pm (McKinley Center)
   d. November 6th (Wednesday) @ 3pm (to be determined)
   e. December 4th (Wednesday) @ 3pm (SJSU)
The National Opportunity and Community Renewal Act (NOCRA)

At the national level, frustrated by constantly having to play defense with federal budget cuts and policies that hurt people in poverty, in their role as members of the Social Policy Committee of the Board of Catholic Charities USA, Monsignor Kevin Sullivan of Catholic Charities of New York and CEO Gregory Kepferle of Catholic Charities of Santa Clara County proposed the idea of championing proactive legislation that would change federal policy and test it locally. In a series of meetings in Lewes, Delaware, a task force organized by Catholic Charities USA crafted the proposed legislation. The National Opportunity and Community Renewal Act (NOCRA) proposed establishing ten demonstration projects to test reform of the service delivery model of federal funds at the local level, enabling each locality to restructure their own service delivery model to break free from the established restrictive government funding models. This creates a new holistic approach to meeting the needs of the individual served, has clear outcome measures, and catalyzes local markets including using tax credits. Catholic Charities of Santa Clara County’s Step Up Silicon Valley decided to test the concept at the local level, which evolved into 1000 Out of Poverty and the local Pay for Success pilots, even though no federal legislation was passed.

To guide and advise this process, Step Up Silicon Valley formed the Outcomes Leadership Council, which included corporate, nonprofit, academic, and government leaders, including among others, Congresswoman Zoe Lofgren; San José State University President Mo Qayoumi; Santa Clara County Supervisor Dave Cortese; American Leadership Forum Silicon Valley CEO Chris Block; Sacred Heart Community Service Executive Director Poncho Guevara; Community Technology Alliance Executive Director Jen Padgett; and current or retired corporate executives from Intersil, McKinsey, Synaptics, and later members from Applied Materials, Cisco, Santa Clara University, and Catholic Charities Board President Khanh Russo.

Phase I: 2007–2010 Timeline

January 10, 2007: CCUSA launches Campaign to Reduce Poverty in America.


2007–2009: CCSCC convenes local organizations, and together they conduct research, organize, build the network, and develop policy priorities, work groups, goals, and action plans. Issue working groups and mission task forces formed. Progress made in engaging partners in core areas of concern:

- **Income**: Santa Clara University (SCU) economics professor Rev. Nicky Santos, SJ, leads Income Working Group focused on social enterprises and the “Base of the Pyramid Protocol” solutions for self-reliance. SCU President Michael Engh, SJ, supports Community Economic Development initiative if faculty can be found to lead it. Conversations with Santa Clara University Business School dean and faculty eventually result in the proposal for a neighborhood-based business development initiative.
- **Education**: Franklin-McKinley School District Superintendent Dr. John Porter and Gregory Kepferle, Catholic Charities CEO, co-chair Education Working Group, during which time the Franklin-McKinley Children’s Initiative is incubated.
- **Housing**: Destination: Home leads Housing Working Group.
- **Food**: Second Harvest Food Bank of Santa Clara and San Mateo Counties leads Food Working Group.
- **Health Care**: Former Executive Director of Healthy Families Leona Butler leads Health Working Group.
**October 2007:** CCSCC begins convening regularly monthly meetings of Campaign to Cut Poverty network members.

**December 19, 2007:** Campaign to Cut Poverty network members vote to name themselves Step Up Silicon Valley (SUSV) after Step Up: Savannah, a community-based anti-poverty collaboration in Savannah, Georgia, developed by the local United Way and the Chamber of Commerce. Keith Fox, a retired corporate tech executive, is named chair of the initiative in Santa Clara County.

**June 2008:** CCSCC’s SAFE model is refined to five areas related to the Campaign to Cut Poverty: income, education, housing, food, and health care.

**September 2008:** CCSCC hires Terrie Iacino to lead SUSV.

**January 14, 2009:** SUSV steering committee at a meeting at Paseo Senter (a low-income housing center) agrees to focus on Santee neighborhood strategy. (The Santee neighborhood, located southeast of downtown San José, is home to many of the city’s low-income immigrant families.)

**February 6, 2009:** SUSV launches Santee Neighborhood Initiative, which becomes the Franklin-McKinley Children’s Initiative.

**Spring 2009:** SUSV launches Community Poverty Simulations (CAPS) and publicly launches the Step Up Silicon Valley plan to reduce poverty at an event at San José City Hall.

**October 2010:** National Opportunity and Community Renewal Act (NOCRA) federal legislation introduced to create innovative market-based anti-poverty pilots. The legislation didn’t pass, but SUSV used the NOCRA principles to launch Pay for Success.

**October 2010:** CCSCC hires Almaz Negash to lead SUSV. Terrie Iacino becomes director of Community Development and Advocacy at CCSCC.

**Phase II: 2011–2017 Timeline**

**February 2011:** SUSV and SCU’s Leavey School of Business propose a neighborhood-based business development initiative nicknamed BRONCO, which becomes the Thriving Neighborhood Initiative organized by SCU in the Washington neighborhood of San José.

**October 2011:** The Franklin-McKinley Women’s Initiative is launched.

**March 2012:** SUSV begins to lead the community engagement and education efforts on Pay for Success.

**March 20, 2012:** The first Social Innovation Leadership Forum is held at the Mexican Heritage Plaza in San José.

**August 2, 2012:** SUSV convenes a group of leaders from the nonprofit, business, government, and education sectors as the Step Up Outcomes Leadership Council.
2012–2013: SUSV participates in San José’s Living Wage Campaign.

January 2013: SUSV, along with a collective group of organizations, launches 1000 Out of Poverty Project.

April 2013: SUSV, in partnership with Community Technology Alliance and Step Up community members, develops the Self-Sufficiency Measure to track client progress in income, education, housing, food, and health care.

August 27, 2013: The Santa Clara County Board of Supervisors unanimously approves the Pay for Success proposal with pilot areas focusing on chronic homelessness and mental illness.

September 2013: SUSV advocates for Coalition Against Payday Predators (CAPP) and its initiative to establish stronger payday lending ordinances.

October 2013: SUSV incubates the College Savings Circle pilot project.

January 2014: In partnership with Santa Clara University, SUSV launches the Learning and Development Series held at SCU.

February 2015: San José Business Tax Reform is proposed at Step Up’s Learning and Development Series by speaker Professor Scott Myers-Lipton of San José State University.

June 2015: With funding from Cisco Systems, SUSV and CCSCC begin to develop and implement the Nonprofit Data Integration Project with 1000 Out of Poverty Project as the first-phase pilot.

June 23, 2015: The Santa Clara County Board of Supervisors approves $6.9 million in financing over a six-year period for Pay for Success Chronic Homelessness: Project Welcome Home.

August 25, 2015: The Santa Clara County Board of Supervisors approves the selection of Telecare Corporation as the service provider for the second Pay for Success project—Pay for Success Chronic Mental Health: Partners in Wellness.

2015: Step Up begins providing quarterly resource- and capacity-building trainings to case managers for the 1000 Out of Poverty Project.

October 14, 2015: The Out of Poverty Summit, organized by CCSCC for its sixtieth anniversary, involves SUSV members and other community, corporate, and civic leaders.

November 2016: SUSV joins other groups to successfully advocate for the passing of Measure A, a $950 million affordable housing bond measure for Santa Clara County.

2017: Work continues on College Savings Circle, Nonprofit Data Integration Project, and 1000 Out of Poverty. Learning and Development Series continues.
Step Up Community Listening Tour

Almaz Negash, Sr. Managing Director of Step Up Silicon Valley, in early 2016, embarked upon a listening tour to build our existing strengths and improve our processes. Over an eight-week period from February to March 2016, she met with community leaders and members as well as Catholic Charities staff to examine Step Up’s work internally and externally. The findings that informed changes to how we ideate, incubate, and launch projects were possible thanks to the following community leaders.

- Dana Bunnett, Executive Director, Kids in Common
- Supervisor Cortese, Santa Clara County
- Patricia Gardner, CEO, Silicon Valley Council on Nonprofits (SVCN)
- Stephen Hicken, Division Director, Catholic Charities of Santa Clara County
- Siobhan Kenny, Executive Director, Applied Materials Foundation
- Greg Kepferle, CEO, Catholic Charities of Santa Clara County
- Julie Lata, Manager, Applied Materials Foundation
- Caroline Ocampo, Chief Communications Officer, Catholic Charities of Santa Clara County
- Randy Pond, emeritus COO, Cisco Systems
- Khanh Duy Russo, Sr. Policy Advisor, Director, Office of Strategic Partnerships and Innovation
- Prof. William Sundstrom, Economist, Santa Clara University
- Kevin Zwick, CEO, Housing Trust
Advocacy Efforts

2010
National Opportunity and Community Renewal Act (NOCRA) (H.R. 6222):
As conceived by Catholic Charities USA, the bill would create ten pilots to test locally controlled anti-poverty strategies that are client-focused, holistic, outcomes based (using the Human Development Index), market driven, and systems changing. The federal legislation failed to gain needed bipartisan support.
Goal: Test new results-based solutions to addressing poverty.

2011
AB 138 – The Elder Economic Planning Act:
This law requires the California Department of Aging to use a supplemental index based on the cost of living to evaluate the needs of low-income seniors. It does not change actual benefits levels. Championed by the Insight Center for Economic Development and supported by Step Up Silicon Valley, it became law.
Goal: To create greater awareness of the true economic needs of low-income seniors.
Source: leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=201120120AB138

2011
AB 6 – CalWORKS and CalFresh:
This bill called for the elimination of fingerprinting and quarterly reporting requirements for CalFresh. The legislation lowered the barrier from quarterly to semiannually for benefits eligibility reporting.
Goal: Lower barriers for low-income people to access benefits and services.
Source: leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=201120120AB6

2011
AB 69 – Senior Nutrition Benefits:
With only 5% of eligible seniors in California receiving CalFresh, this bill (which became law) aims to increase the enrollment of eligible seniors on Social Security into CalFresh by streamlining the application process and encouraging applications for state waivers as needed.
Goal: Increase access by low-income seniors to existing food benefits.
Source: leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=201120120AB69

2012
San José’s Living Wage Campaign:
This campaign, launched by San José State University students and led by a labor coalition, was placed on the November 2012 ballot as Measure D. The measure increased the hourly minimum wage in San José from $8/hour to $10/hour with yearly adjustments for inflation. Forty thousand people were impacted by this increase.
Goal: To raise the hourly minimum wage.
Source: https://ballotpedia.org/San_Jose_Minimum_Wage_Increase_Initiative__Measure_D___(November_2012)
2013  
Anti-Payday Lending:  
Anti-payday lending advocacy work in Santa Clara County is led by the Coalition Against Payday Predators (CAPP), of which SUSV is a member. Payday lending is a predatory business that provides borrowers with high interest loans. This system propagates and sustains poverty by keeping economically vulnerable members of our community in a cycle of debt. In 2013, the CAPP coalition led by the Law Foundation of Silicon Valley moved anti-payday lending efforts from San José to Sunnyvale. The Sunnyvale Planning Commission unanimously passed a recommendation to establish a stronger payday lending ordinance that capped the number of payday loan shops, enacted new distance requirements, and required lenders to provide information to borrowers on alternatives. The Sunnyvale City Council approved the ordinance on September 24.  
Goal: Preserve people's scarce assets by protecting them from usury.  
Source: stepupsv.org/incubation/anti-payday-lending

2015–2016  
San José Business Tax Reform:  
The idea of business tax reform was incubated at Step Up Silicon Valley's Learning and Development presentation in February 2015 in order to create public works jobs. Step Up then convened follow-up meetings to create the initial campaign. In 2016, the project moved forward under the leadership of San José State Professor Scott Myers-Lipton as a gross receipts tax, and through a compromise with the City of San José, it became the San José Business Tax Reform, known as Measure G on the November 2016 ballot. Among other things, the measure increased the minimum base tax and required payment of it by all businesses, and it raised the annual cap on the maximum amount of tax payable. Measure G passed and went into effective July 1, 2017, effectively doubling the existing business tax.  
Goal: Raise public funds to create more public works jobs.  
Source: https://ballotpedia.org/San_Jose,_California,_Business_Tax_Increase,_Measure_G_(November_2016)

2016  
Measure A – Yes on Affordable Housing:  
This measure provides $950 million in affordable housing opportunities across Santa Clara County for hardworking families and our most vulnerable communities, including veterans, seniors, homeless children, and low-income and working families. The measure passed with a super-majority of voters.  
Goal: Increase the number of units of affordable housing.  
Source: yesonaffordablehousing.org

2017  
AB 1520 – Lifting Children and Families Out of Poverty Act:  
This bill calls for the convening of a group of experts from inside and outside of government who will set a framework for California to dramatically reduce its child poverty rate. This will be done by investing in proven solutions such as voluntary home visiting; high-quality, affordable early childhood education; after-school and summer programs; earned income tax credits for working families; and job training. Step Up supported the bill, which was promoted by GRACE (the Daughters of Charity anti-poverty organization) and passed into state law.  
Goal: To reduce child and family poverty by 50% in the next twenty years  
Appendix 2: Step Up’s Self-Sufficiency Measure

In 2011, Step Up adopted an issue-specific measurement known as the Self-Sufficiency Measure (SSM), which addresses the five categories of poverty and prosperity: income, education, housing, food, and health care. The degree of access to which an individual or family has to each of the five categories is described on a scale of 1 to 5, which indicates the progression of poverty to prosperity in three phases: surviving, striving, and thriving. Individuals receiving scores of 1 to 2 (surviving) either lack or struggle to have access to those respective categories. Individuals receiving a 3 (striving) have attained an adequate degree of access to the respective categories, and scores of 4 and 5 (thriving) indicate that individuals are at the most successful stages of achieving self-sufficiency. Our goal is to use employment as a means of empowering adults into the thriving stage. Scores less than three indicate a state of poverty for that particular category.

The SSM is used by case managers to assess and prioritize client needs, and to coordinate care among providers with the goal of moving the client out of poverty. Case managers meet with clients to collect data such as demographic information (age, name, gender, household size) and historical information about services (such as general assistance, food stamps, CalWORKs) in order to assess future service needs.

### Income

1. No income
2. Inadequate income and/or spontaneous or inappropriate spending
3. Can meet basic needs with subsidy; appropriate spending
4. Can meet basic needs and manage debt without assistance
5. Income is sufficient, well managed; has discretionary income and is able to save

### Education

1. Literacy problems and/or no high school diploma/GED are serious barriers to employment
2. Enrolled in literacy and/or GED program and/or has sufficient command of English to where language is not a barrier to employment
3. Has high school diploma/GED
4. Needs additional education/training to improve employment situation and/or to resolve literacy problems to where they are able to function effectively in society
5. Has completed education/training needed to become employable. No literacy problems.

### Housing

1. Homeless or threatened with eviction
2. In transitional, temporary or substandard housing; and/or current rent/mortgage payment is unaffordable (over 30% of income)
3. In stable housing that is safe but only marginally adequate
4. Household is in safe, adequate subsidized housing
5. Household is safe, adequate, unsubsidized housing

### Food

1. No food or means to prepare it. Relies to significantly on other sources of free to low-cost food.
2. Household is on food stamps
3. Can meet basic food needs, but requires occasional assistance
4. Can meet basic food needs without assistance
5. Can choose to purchase any food household desires

### Health Care

1. No medical coverage with immediate need
2. No medical coverage and great difficulty accessing medical care when needed. Some household members may be in poor health
3. Some members (e.g. children) on Medi-Cal, but adults lack coverage
4. All members can get medical care when needed, but may strain budget
5. All members are covered by affordable, adequate health care
Appendix 3: Federal Supplemental Poverty Measure and California Poverty Measure

In recognition of the disparities in the cost of living in various geographical areas, the US Census Bureau in 2011 began publishing the Supplemental Poverty Measure (SPM), which extends the official poverty measure (which for a family of four, in 2011, was up to $24,036 without government subsidy). While the official poverty measure doesn’t take government assistance into account, the SPM does. For example, the income level of a family of four with SPM will be at about $39,000 including the government subsidy. An income of $39,000 in Santa Clara County, however, does not begin to cover the cost of living here or elsewhere in California.

Because of the high cost of living in California, the Stanford Center on Poverty and Inequality (inequality.stanford.edu) and the Public Policy Institute of California (www.ppic.org) have developed the California Poverty Measure (CPM), which takes into account the cost of living in different regions of California. Step Up Silicon Valley and Catholic Charities of Santa Clara County have adopted the California Poverty Measure.
Appendix 4: Launching a Local Anti-Poverty Initiative

If you have made it this far, hopefully you aren’t completely overwhelmed by the challenges a social change initiative faces. If you and your colleagues are considering launching an anti-poverty initiative in your local community that will challenge the preconceived notions of how to address poverty, it’s helpful to start with asking yourselves some questions, and then being honest with yourselves on the answers. You may not have all the answers today, but just asking yourselves the questions will start to create the change you seek.

What follows are questions we asked ourselves in the early days of Step Up Silicon Valley, and other questions we should have asked ourselves sooner. You may have your own questions.

Questions to Consider

How do we radically change the way we think and act in order to end the cycle of poverty in our community?

“How do we create a movement, across sectors, to address this question and to have significant impact?”

What’s the idea?
- Does the concept have the potential to alleviate, prevent, or reduce poverty in a new way?
- Can it be applied locally?

What’s the plan?
- Has a similar plan been tried elsewhere? With what results?
- What is the plan and time frame for ideation, incubation, and implementation?

Who’s involved?
- Is there a committed leader?
- Is there a committed local partner or partners?
- Can the plan generate community support?
- Does it engage people in poverty as leaders or partners?
- Who opposes the plan and how can they become unexpected allies?

How are decisions made?
- What is a workable governance structure?
- Are people in poverty included in the decision making?

How is the plan communicated?
- Can the plan be communicated clearly and easily?
- Who do you want to reach with what message?
- What tools will you use—print, social media, public media, etc.?

How is it funded?
- Can the plan generate both startup and multi-year funding support?
- How will the funds be raised?

How do you know it’s working?
- What evaluation methods do you use?
- Who conducts the evaluation?
- Can it generate policy change?
- Does it have the potential to scale or to be replicated?
- What does success look like?
Appendix 5: Resources

Publications

Catholic Charities USA


Other
The Non Nonprofit: For-Profit Thinking for Nonprofit Success by Steve Rothschild (Jossey-Bass, 2012)

Think and Act Anew: How Poverty in America Affects Us All and What We Can Do About It by Larry Snyder, former president and CEO of Catholic Charities USA (Orbis Books 2010)

Websites

Collective Impact Framework
www.collaborationforimpact.com/collective-impact

Collective Impact | Stanford Social Innovation Review
https://ssir.org/articles/entry/collective_impact

College Savings Circle
- Children’s Savings Accounts (CSAs) https://prosperitynow.org/about-csas
- Silicon Valley Education Foundation https://svefoundation.org

Community Action Network, Missouri www.communityaction.org

End Child Poverty in California www.endchildpovertyca.org

Franklin-McKinley Children’s Initiative https://fmci-sj.org

Measure A: Yes on Affordable Housing yesonaffordablehousing.org

Nonprofit Data Integration Partners
- Benetech https://benetech.org
- Bitfocus https://bitfocus.com
- Community Technology Alliance https://ctagroup.org
- HandUp https://handup.org
- Foothold https://footholdtechnology.com
- SoPact https://www.sopact.com
- ThingLogix www.thinglogix.com

1000 Out of Poverty Partners
- The Bill Wilson Center www.billwilsoncenter.org
- Catholic Charities of Santa Clara County www.catholiccharitiesssc.org
- Next Door Solutions to Domestic Violence www.nextdoor.org
- The Stride Center www.stridecenter.org

Opportunity Youth Partnership stepupsv.org/incubation/opportunity-youth-partnership
**Pay for Success**
- County of Santa Clara Launches California’s First “Pay for Success” Project [https://www.sccgov.org/sites/opa/nr/Pages/ProjectWelcomeHome.aspx](https://www.sccgov.org/sites/opa/nr/Pages/ProjectWelcomeHome.aspx)
- Santa Clara County Selects Telecare Corporation for Innovative “Pay for Success” Project [https://www.sccgov.org/sites/opa/nr/Pages/Santa-Clara-County-Selects-Telecare-Corporation-for-Innovative-%E2%80%9CPay-for-Success%E2%80%9D-Project.aspx](https://www.sccgov.org/sites/opa/nr/Pages/Santa-Clara-County-Selects-Telecare-Corporation-for-Innovative-%E2%80%9CPay-for-Success%E2%80%9D-Project.aspx)

**Poverty Research**
- California Budget and Policy Center [calbudgetcenter.org](http://calbudgetcenter.org)
- Center for Poverty Research, University of California, Davis [https://poverty.ucdavis.edu](https://poverty.ucdavis.edu)
- Federal Poverty Rate for Santa Clara County [https://www.census.gov/quickfacts/fact/table/santaclaracountycalifornia/IPE120216#viewtop](https://www.census.gov/quickfacts/fact/table/santaclaracountycalifornia/IPE120216#viewtop)
- Insight Center for Community Economic Development [https://insightcced.org](https://insightcced.org)
- Joint Venture Silicon Valley [https://jointventure.org](https://jointventure.org)
- National Low Income Housing Coalition [nlihc.org/oor/california](http://nlihc.org/oor/california)
- State of the Union | Pathways, Stanford Center on Poverty and Inequality [inequality.stanford.edu/sites/default/files/Pathways-SOTU-2016.pdf](http://inequality.stanford.edu/sites/default/files/Pathways-SOTU-2016.pdf)


**Santa Clara University College of Arts and Sciences, Department of Environmental Studies and Sciences** [https://www.scu.edu/cas/ess/](http://www.scu.edu/cas/ess/)

**Santa Clara University Leavey School of Business** [https://www.scu.edu/business/](http://www.scu.edu/business/)

**Santa Clara University Miller Center for Social Entrepreneurship** [https://www.scu-social-entrepreneurship.org/](http://www.scu-social-entrepreneurship.org/)

**Silicon Valley Social Innovation Leadership Network, San José State University** [www.sjsu.edu/svsiln/](http://www.sjsu.edu/svsiln/)

**Stanford Center on Poverty and Inequality** [inequality.stanford.edu](http://inequality.stanford.edu)


**United Way, Struggling to Get By: The Real Cost Measure in California 2015** [https://www.unitedwaysca.org/realcost](http://www.unitedwaysca.org/realcost)
Our Network of Support

Many individuals, organizations, nonprofits, and government entities have participated in and promoted the evolution and work of Step Up Silicon Valley. All have played a vital role in supporting our vision and mission to reduce poverty in Santa Clara County. It is with deep gratitude that we acknowledge and thank our partners and funders.

Seed Funders

SACRED HEART COMMUNITY SERVICE

Catholic Charities of Santa Clara County

Sustainable Funders

APPLIED MATERIALS

Catholic Charities of Santa Clara County

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- Almaz Negash, Sr. Managing Director, Step Up Silicon Valley
- Joyce Osland Ph.D, Professor, Executive Director, Global Leadership Advancement Center, San José State University
- John Swan, Partner, Business Development Accelerators
- Dave Wilde, Micro Focus, Operations Management

Outcomes Leadership Council (2011-2014)

- Chris Block, CEO, American Leadership Forum
- Supervisor Dave Cortese, Santa Clara County
- Poncho Guevara, Executive Director, Sacred Heart Community Service
- Susan Hardman, SVP, Intersil
- Gregory Kepferle, CEO, Catholic Charities of SCC
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- Almaz Negash, Managing Director, SUSV
- Jen Padgett, Executive Director, Community Technology Alliance
- Nancy Pena, Director Santa Clara County Mental Health Department
- Bruce Wagstaff, Director, Santa Clara County Social Services Agency
- Don Watters, Director Emeritus, McKinsey & Company

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- The-Vu Nguyen, Policy Aide to Sup. Cortese
- Sandra Soto, Congresswomen Lofgren, Chief of Staff


- American Leadership Forum, Silicon Valley
- Applied Materials Foundation
- Assembly member Jim Beall’s Office
- Bill Wilson Center
- Catholic Charities of Santa Clara County
- Center for Employment and Training
- Charities Housing Development Corporation
- City of San José
- City of Santa Clara
- Community Services Agency, Mt. View/Los Altos
- Community Solutions
- Community Technology Alliance
- CommUniverCity San José
- Companions in Ignatian Service and Spirituality
- Congressman Mike Honda’s Office
- Congresswoman Zoe Lofgren’s Office
- Consulting Within Reach (CWR)
- Council of Churches of Santa Clara County
- County of Santa Clara
- Destination: Home
- Diocese of San José
- Downtown Streets Team Inc.
- Family Supportive Housing
- First Five of Santa Clara County
- First Presbyterian Church of San José
- Franklin-Mckinley Children’s Initiative
- Franklin-Mckinley School District
- Goodwill of Silicon Valley
- The Health Trust
- Holy Family Parish
- Housing Trust of Santa Clara County
- Insight Center for Community Economic Development
- Jewish Family Services of Silicon Valley
- Kids in Common
- Law Foundation of Silicon Valley
- Loaves & Fishes Family Kitchen
- LifeMoves
- Loaves & Fishes Family Kitchen
- Lucile Packard Children’s Hospital at Stanford
- Next Door Solutions
- NOVA Workforce Development
- Opportunity Fund
- Opportunity Youth
- Presbytery of San José
- Project Hired
- Rise Bay Area Together
- Sacred Heart Community Service
- Sacred Heart Parish, Saratoga
- Salvation Army Silicon Valley
- San José Chamber of Commerce
- Santa Clara County Office of Education
- Santa Clara University
- Second Harvest Food Bank
- Silicon Valley Council of Nonprofits (SVCN)
- Silicon Valley Education Foundation
- San José State University Center for Community Learning & Leadership
- San José State University Business School
- Society of St. Vincent de Paul Santa Clara Council
- St. Joseph’s Family Center
- Stanford Center for the Study of Poverty & Inequality
- The Stride Center
- Sunday Friends
- Sunnyvale Community Services
- Supervisor David Cortese
- Temple Emanu-El
- Trinity Cathedral
- United Way of Silicon Valley
- Victory Outreach Ministries
- West Valley Community Services
- Year Up