

LIFT HOPE, MONEY, LOVE AT SCALE

Four-Year Plan

LIFT's model aims to mitigate, and ultimately change, the actions of systems that drain hope, harm communities, and take away financial and economic support when families need them the most. We build families' well-being, financial strength, and social connections to lift two generations at once – an investment of hope, money, and love.

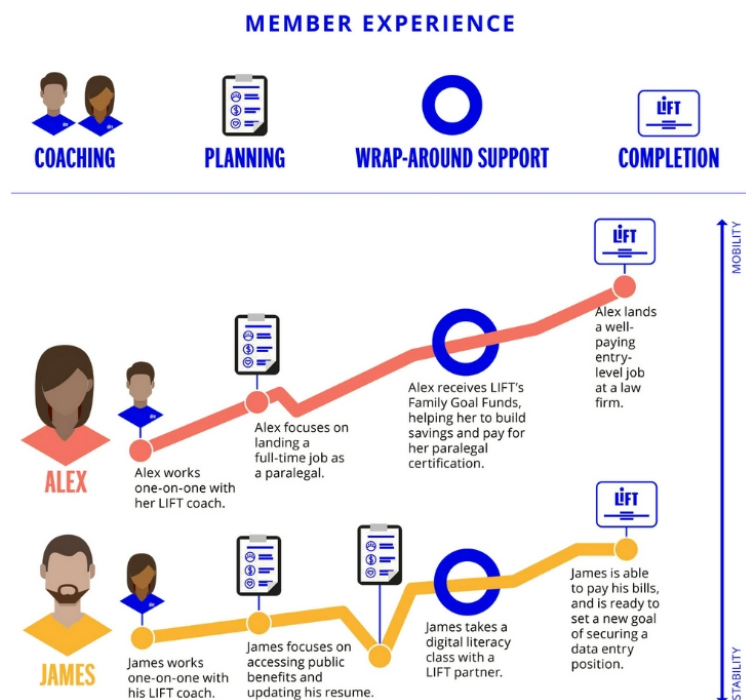
Because of systems built on a history of wealth blocking and stripping policies, the wealth divide between white families and Black and Brown families is projected to double by 2045 to over \$1 million. LIFT's goal is to reverse this trend. LIFT has an ambitious four-year plan to increase our reach 10x by 2025, using a race, equity, and inclusion lens to achieve results in three ways: 1) **direct service**, 2) **technical assistance**, and 3) **policy advocacy**.



OUR MODEL & RESULTS

Founded on a relationship based on dignity and trust, our trained coaches partner in **loving** support with parents to secure living wage jobs, continue their education, and increase their financial health. We reduce stress, enliven **hope**, and increase financial slack by giving **money** directly to parents so that they don't have to choose between emergency needs and long-term goals.

A **recent external evaluation of our program found statistically significant increases** in our families' personal and household income, employment, financial well-being, social support, and educational enrollment and attainment.



FY22 IMPACT
for families with an income goal

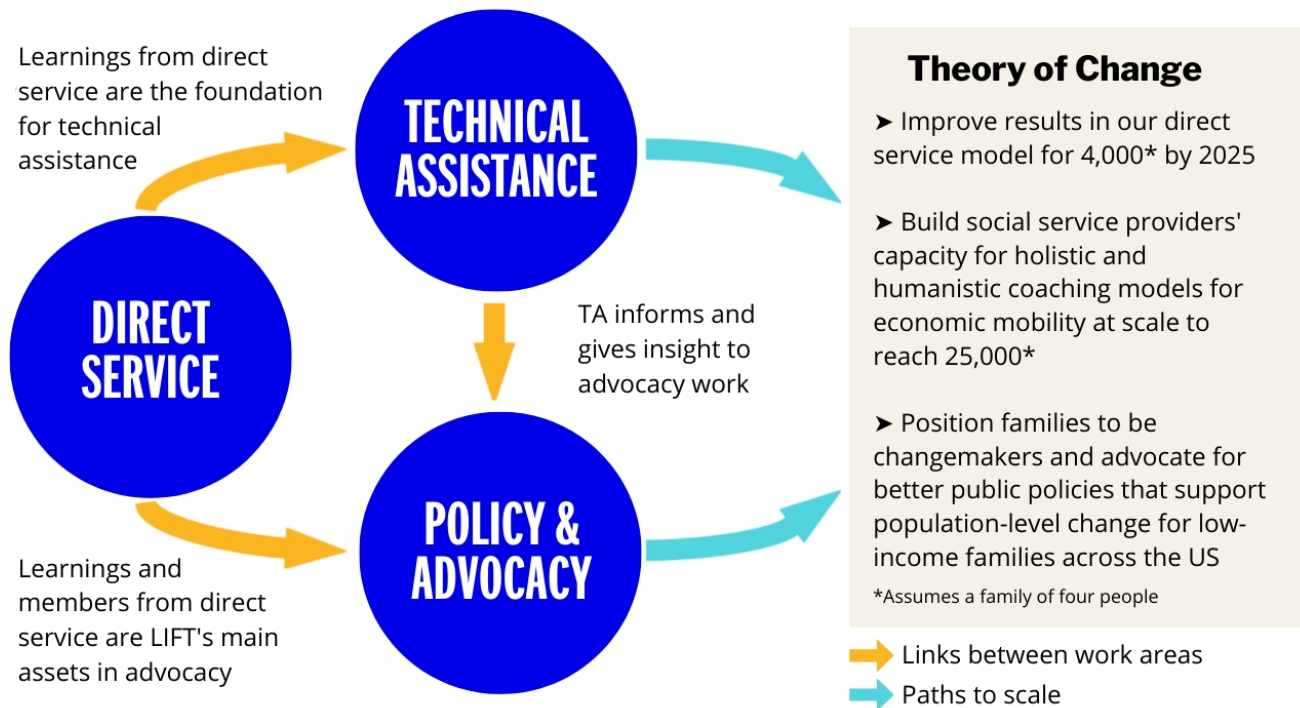
\$21,234
INCREASED INCOME

\$4,761
INCREASED SAVINGS

\$2,310
DECREASED DEBT

OUR STRATEGIC PLAN IN ACTION

LIFT's four-year strategic plan – guided by LIFT member parents – builds on our successful **direct service** model and scales our impact through **technical assistance** and **policy advocacy**.



CHANGING LIVES: DIRECT SERVICE ACTION TANK



Despite the effects of the pandemic, 91 percent of members made progress on their financial goals over the last fiscal year (e.g., secured employment, increased income, increased savings, reduced debt, completed degree or certification). Across all regions, more than half of our members also showed a meaningful increase in well-being including increased feelings of hope and decreased stress.

LIFT offers hybrid virtual coaching nationwide, while also providing opportunities for members to build social capital through a new group coaching model. We seek to define the correlation between personal, financial, and social supports that produce sustained economic mobility for families.

CHANGING SYSTEMS: TECHNICAL ASSISTANCE & POLICY

We acknowledge there is a clear line that connects slavery to Jim Crow to redlining to the current systems that have been intentionally designed to disadvantage the very families we serve. To address the systemic challenge, LIFT's direct service programming serves as an action tank to refine our approach to holistic economic coaching. We leverage our program learnings and member insights to inform two scaling strategies: **technical assistance** and **policy change**.

Our **technical assistance** (TA) work expands the reach of LIFT's model beyond our brick and mortar sites to influence systems where our families already show up. We infuse holistic economic coaching from our direct service program to transform systems of health care, government as well as early childhood and higher education. Using a high-touch, tailored approach, we support social service providers to transition from traditional case management to a holistic and humane coaching model. LIFT will grow to 20 TA sites by 2025 and provide a proof point for how systems can better meet the needs of parents at scale.



*A third-party multi-year randomized control trial study of LIFT's partnership with **Harbor-UCLA Medical Center** found that when financial coaching was implemented in a pediatric primary care setting, missed visit rates decreased by half, which in turn significantly reduced the risk of missed vaccinations.*

LIFT's **policy and advocacy** goals stem from the humanity that underpins our direct service model. We recognize that much of our existing social service system perpetuates inequity by design: we raise our families' voices to reimagine those systems. Working in concert with influential policy shops, we educate legislators, shift media narratives, and advocate for eliminating barriers to economic mobility and reducing poverty for all.

OUR POLICY PARTNERS INCLUDE



**HUMANITY
FORWARD**



**LIFT HAS BEEN
FEATURED IN**

The New York Times



AXIOS

PEDIATRICS
OFFICIAL JOURNAL OF THE AMERICAN ACADEMY OF PEDIATRICS



Stanford **SOCIAL
INNOVATION** Review

SCALING IMPACT: SPOTLIGHTS



Building Capacity in Community Colleges

To assist student-parents in completing their degree en route to their career aspirations, LIFT partners with community colleges. In New York, we train **Bronx Community College** advisors to provide wrap-around support to low-income students with plans to expand the program throughout the **City University of New York** system.



Engaging Parents via Early Childhood Education Programs

Supported by a five-year federal grant with the **Office of Head Start**, LIFT serves as the Family Economic Mobility and Community Engagement expert for the National Center for Parent, Family, and Community Engagement, building the capacity of Head Start staff nationwide to support parents to achieve their personal, financial, and social wellness goals.



Promoting a Human-Centered Approach in Government

To shift from case management to a holistic coaching approach with TANF-recipient families, LIFT supports **DC's Office of Work Opportunity** through technical assistance. After working with LIFT, 100% of case managers felt comfortable having conversations with their clients about money and career planning.



Influencing Policy in Chicago and Beyond

In the last year, LIFT-Chicago parents provided testimony on the importance of cash transfers, leading to a new investment from the **City of Chicago** in a guaranteed income pilot. LIFT-Chicago are partnered with the **Illinois State Treasurer's office** to ensure inclusive and equitable roll-out of IL's new universal child savings accounts (CSA).

GET INVOLVED

To achieve these pathways to scale, our budget and internal capacity must grow. Over the next four years, LIFT will 10X our reach while reducing our cost per family served. We seek new donors as well as program and policy partners to bring our goals to life. Please contact gscheck@whywelift.org for additional information on our work.



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