BenePhilly, City of Philadelphia: Innovations in American Government Award Case Study

Citation

Gardner, Betsy. 2022. "BenePhilly, City of Philadelphia: Innovations in American Government Award Case Study." Ash Center Policy Briefs Series.

Published Version

https://ash.harvard.edu/publications/benephilly-city-philadelphia-innovations-american-government-award-case-study

Permanent link

https://nrs.harvard.edu/URN-3:HUL.INSTREPOS:37370806

Terms of Use

Share Your Story

BenePhilly, City of Philadelphia

Innovations in American Government Award Case Study

JANUARY 2022

HARVARD Kennedy School
ASH CENTER
for Democratic Governance and Innovation

BenePhilly, City of Philadelphia

Innovations in American Government Award Case Study

JANUARY 2022

About the Ash Center

The Roy and Lila Ash Center for Democratic Governance and Innovation advances excellence and innovation in governance and public policy through research, education, and public discussion. By training the very best leaders, developing powerful new ideas, and disseminating innovative solutions and institutional reforms, the Center's goal is to meet the profound challenges facing the world's citizens. The Ford Foundation is a founding donor of the Center. Additional information about the Ash Center is available at ash.harvard.edu.

This research paper is one in a series published by the Ash Center for Democratic Governance and Innovation at Harvard University's John F. Kennedy School of Government. The views expressed in the Ash Center Policy Briefs Series are those of the author(s) and do not necessarily reflect those of the John F. Kennedy School of Government or of Harvard University. The papers in this series are intended to elicit feedback and to encourage debate on important public policy challenges.

About the Author

Betsy Gardner is a research assistant and writer for Digital Platforms and Practitioner Content for the Innovations in Government Program at the Ash Center. She is also an integral member of the Ash Center's diversity, equity and inclusion (DEI) efforts, actively contributing to the Center's DEI Steering Committee as a co-representative of the Diversity in Recruitment, Hiring & Retention Subcommittee.

Prior to joining the Ash Center, Betsy worked in a variety of roles in higher education, including Research Programs Manager at Emerson College and Assistant Director of Training at Northeastern University. Her professional and volunteer work focuses on dismantling racial and gender inequality through research, writing, and facilitation. She specializes in delivering content in a direct and engaging manner, for audiences such as Major League Baseball, the MIT Sloan School of Management, and the Smart Citizenship Academy in Cascais, Portugal.

She also researches and writes on government spending and transparency for the Lincoln Institute of Land Policy. Betsy holds a master's degree in Urban and Regional Policy from Northeastern University, and a bachelor's degree in Art History from Boston University.

Contents

Foreword

When we began planning for the 2019–2020 Innovations in American Government Awards competition, we could not have imagined how much the world would change by the time we would conduct our finalist presentations in March of 2020. During the planning phase in the prior year, rising inequities drove us to organize that cycle's competition around issues of economic mobility.

One of the programs that ultimately rose to the top of our applicant pool was BenePhilly, a partnership among the Philadelphia-based nonprofit Benefits Data Trust (BDT), the City of Philadelphia, and the Pennsylvania Departments of Aging and Human Services that works to enroll eligible Philadelphians in over 20 public benefit programs. Trained counselors assist with completing forms, organizing key documents, and tracking the status of applications. The anti-poverty program operates out of municipal offices, a mobile unit, and multiple community-based agencies across the city.

Unfortunately, the COVID-19 pandemic has only exacerbated the need for critical benefits, making the work of BenePhilly all the more important.

This paper by my colleague Betsy Gardner explores the BenePhilly program and provides a guide to others looking to adopt a similar model. A special thank you to Dr. Theresa Anderson, a senior research associate at the Urban Institute, who conducted a site visit of the program for our Innovations in American Government Awards and who provided resource materials for this report.

–Stephen Goldsmith

Executive Summary

> "No one should have to choose between paying for healthcare and putting food on the table. With $450 million in benefits going untapped each year in Philadelphia, increasing benefits access would get this assistance to the thousands of Philadelphians facing these unconscionable choices."
>
> *Pauline Abernathy, Chief Strategy Officer at Benefits Data Trust*

The American social safety net exists to meet the needs highlighted above: unemployment assistance, supplemental money for food, help with health care costs and medical expenses, and more. However, the process of signing up for these services is often time-consuming, confusing, repetitive, and frustrating.

To address these challenges, the Philadelphia-based nonprofit Benefits Data Trust (BDT) developed BenePhilly, in partnership with the City of Philadelphia and the Pennsylvania Departments of Aging and Human Services, to inform people of their eligibility for benefits and assist them in quickly and efficiently enrolling. This paper is a case study of the BenePhilly program and will serve as a guide to replicate its success. By using proven, data-driven methods, the program connects high-need, eligible individuals with up to 19 different benefits, all while reducing overall poverty, providing a better application experience, and increasing trust in local government.

BenePhilly is a network of government agencies, nonprofits, and community-based organizations connecting Philadelphians to benefits through targeted, data-driven outreach, referrals from a network of organizations, and in-person and telephone application assistance. The trained staff at both BDT and the nonprofit organizations embedded in the communities they serve help individuals easily find and enroll in benefits. According to BDT's Chief Strategy Officer Pauline Abernathy, BenePhilly has helped more than 125,000 Philadelphia residents secure over $1.6 billion in benefits as of January 2021.

BenePhilly uses BDT software that combines multiple program applications into a single interview to determine eligibility for state, federal, and local assistance programs. The ease and speed of this software cannot be overstated when compared to traditional enrollment, which frequently lacks a solution to easily determine eligibility and apply across multiple benefits.

Lastly, the idea of targeted outreach is highly replicable and is already being utilized in multiple other cities and states. Easily scalable, BenePhilly has the potential to revolutionize the reach and effectiveness of the existing social safety net. For this reason, the Ash Center for Democratic Governance and Innovation recognizes BenePhilly as a finalist for the 2020 Innovations in American Government Awards.

Introduction and about BenePhilly

It is not good for low-income families, communities, or cities to leave money on the table. However, a significant number of people who are eligible for means-tested (income-based) government assistance—be it Medicaid, the Special Supplemental Nutrition Program for Women, Infants and Children (WIC), or the Supplemental Nutrition Assistance Program (SNAP)—do not receive the benefits for which they are eligible. In fact, an Urban Institute assessment from 2019 found that "a quarter of people living in poverty do not receive support" from any of the six major safety net programs studied.[1]

Connecting to just one of these programs tangibly improves the quality of life for individuals and families living in poverty.[2] Connecting to the full number of benefits for which they are eligible has an even greater impact,[3] particularly for families with young children. The benefits are not only in the financial assistance itself, but also in the stabilization these supports provide, which helps individuals

and families become more self-sufficient.[1] Yet, even though being eligible for one form of means-tested assistance increases the likelihood of being eligible for others,[5] many people struggle to enroll in and benefit from all the programs to which they are eligible, thereby hampering their ability to stabilize their living situation and put their efforts toward work, education, family, and other activities. There is also a cascading, positive benefit for children when they grow up in a stable environment with access to food and medical care.[6]

According to Senior Fellow Dorothy Rosenbaum and former Vice President for Food Assistance Policy Stacy Dean, from the Center on Budget and Policy Priorities:

> In the vast majority of states, families continue to face multiple processes to obtain and retain benefits . . . taken together they remain highly duplicative, uncoordinated, and confusing. As a result, it is not entirely clear how much progress has been made from the perspective of an individual family or the caseworker who delivers some or all of the available programs. Finally, few—if any—states have an effective, data-based system for assessing their success in coordinating work support programs.[7]

BenePhilly helps eliminate the "duplicative, uncoordinated, and confusing" applications referenced by Rosenbaum and Dean. With one phone call to the BenePhilly hotline or a visit to an in-person Bene-Philly center, eligible residents can apply for 10 assistance programs, and learn their likely eligibility status for an additional nine. BDT also helped the state obtain and implement a waiver from the federal government in 2016 that enabled eligible SNAP participants to enroll in Medicaid based on simple consent instead of a separate application.

The concept of BDT originated in 2003. The State of Pennsylvania has run a prescription assistance program for low-income seniors who were struggling to pay for medications since 1985. Initially, many seniors were not enrolled in all eligible benefit programs. Noticing this, an employee in the state's Department of Aging teamed up with BDT's founder to develop a data-driven outreach program to increase enrollment. This approach worked so well that in 2005, the nonprofit director established the nonprofit BDT to run a more comprehensive version of the program,[8] which connected seniors to multiple benefits, beyond simply prescriptions, through data-driven outreach and individual application assistance.

BDT continued to work with the state government to find seniors who were enrolled in other state programs but were not enrolled in PACE, the state's prescription assistance program. Once potential participants were identified through this data matching, BDT sent official letters alerting each senior to their eligibility for PACE and urging them to get in touch with BDT's PACE Application call center. The call center then assisted them with signing up for PACE and any other programs for which they were eligible. This removed the barrier of multiple applications and the burdensome documentation requirements for each benefit and streamlined the process of connecting seniors with food and health care resources. By 2008, BDT, the state, and the city launched BenePhilly to enroll seniors in five state and federal benefits.

By 2014, this model was so successful that as part of the city's anti-poverty efforts, led by the Office of Community Empowerment and Opportunity (CEO), the city of Philadelphia expanded BenePhilly to include walk-in BenePhilly centers throughout the city, more referral-based support, and benefits enrollment for all ages.
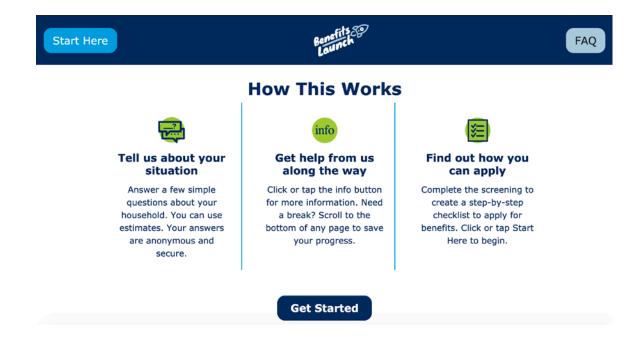
BenePhilly now connects eligible city residents of all ages to the benefits programs that they qualify for, with a data-driven system that is designed around the user, not bureaucracy, and which centers the dignity and humanity of each person helped.

Solutions

Identifying eligible persons and connecting them with benefits through data matching is an effective and unique method. One outreach strategy is based on accessing and comparing data on different types of government assistance. Finding gaps in those lists allows the program administrators to directly connect with individuals they know are eligible for assistance and alert them to the amount they could receive. This reduces the personal burden of researching assistance programs and determining eligibility.

As a nonprofit organization, BDT has been successful precisely because it is able to bring together data on multiple programs by negotiating with each agency that holds relevant records and then merging the information using their advanced information technology resources. BDT deploys benefits screening and application tools that local nonprofits and clients can use to connect to assistance; this software is more innovative than those typically used by government agencies.

BDT's benefit application software is the technology backbone, a standalone tool that creates a single application for multiple benefits across agencies and caters to what the direct service provider needs to successfully complete applications for their client. The benefits screening tool is an online and public-facing option that helps individuals identify if they are eligible for benefits and guides them to where they can get assistance applying or apply on their own (see screenshot below). Both were built using human-centered design principles, making them easy to navigate for both direct service providers and individual users.

From this screen, individuals can determine their eligibility for programs.

Despite the simplicity and ease-of-use of BDT's full application tool, it encompasses information from multiple programs. For instance, the technology scans multiple policies and application criteria in a matter of minutes to determine eligibility across a wide range of assistance programs. The tool is so

powerful that BenePhilly's call center and BenePhilly in-person center employees can connect clients with 19 benefits and submit their applications in half an hour.

As outlined in the introduction, the program originally only helped low-income seniors but, through state and local support, grew into a network that has helped over 125,000 Philadelphians, with Benefits Data Trust (BDT) as the operating nonprofit. Funding for BDT comes through several sources, including the state and the city, as well as philanthropic and corporate partners. BenePhilly has specifically functioned as a public-private partnership. It has influenced the benefits access strategy referenced in Philadelphia's most recent 2020 Poverty Action Plan.

Enrollment through BenePhilly can be in-person or through the call center. There are over 50 direct service employees, who provide enrollment support. The city employs staff to run the BenePhilly Mobile Unit, a van that visits different areas of the city and helps people enroll for benefits in person. In February 2020, at the time of IAG's site visit, the mobile unit was focused on gun violence hotspots, with the goal of providing access to benefits to help alleviate some of the financial pressure that feeds into local violence and help build trust in government.

In-person enrollment also happens at local direct service organizations, called BenePhilly centers. These centers are trusted nonprofits around the city that already serve high-need clients, including individuals experiencing homelessness, immigrants, and veterans. They employ BenePhilly Counselors fully dedicated to assisting with enrollment, in multiple languages, leveraging a translation service that has more than 170 languages, including Russian and Spanish. By co-locating in nonprofits' offices, the BenePhilly program helps build on the trust and standing of those organizations in their local communities, and the organizations can offer benefits enrollment services that they are otherwise not equipped to conduct.

Outcomes and Results

As of January 2021, BenePhilly had served over 125,000 Philadelphians and unlocked over $1.6 billion in benefits. This is the most obvious, immediate outcome of the program; individuals are connected to the benefits for which they are eligible and are therefore better able to meet their basic needs for food, shelter, and health care.

Long-term, BenePhilly improves the economic and health conditions of families and communities through poverty reduction. By linking individuals and families with necessary benefits and services that address physical and mental health, education, and employment assistance, current and future generations can be upwardly mobile and prosperous.

An independent evaluation by researchers from Northwestern University and Massachusetts Institute of Technology found significant positive outcomes from BDT's outreach and enrollment model. [9] The researchers conducted a randomized control trial involving 30,000 elderly residents of Pennsylvania who were unenrolled in SNAP but were likely eligible for assistance. Only six percent of the participants in the control group enrolled, but 18 percent of the group that received a mailer that included BDT's call center number signed up. The researchers found that calling BDT significantly increased the likelihood that a person would enroll in SNAP benefits.

During an interview with one of the researchers, they reiterated that the program had an impressively large impact. They also mentioned that BDT had a trusting relationship with the state, and, by virtue of their data-sharing agreement, the state was motivated to be more organized with the administration and quality of its data.

Increased trust is another underlying outcome of BenePhilly. In addition to the secure relationship between BDT and the state and local governments, the positive relationship between BenePhilly and

the service population increases trust in the government. During the February 2020 site visit, representatives from the Philadelphia's Office of Community Empowerment and Opportunity and City Council stated that they see the program as building trust in the local government, with BenePhilly as the intermediary between eligible individuals and the government-funded assistance programs. The Philadelphia government also trusts BenePhilly to help inform policy and the city's anti-poverty strategy.

The only possible issue with the targeted outreach model is that potential applicants must be willing to engage with or enroll in at least one program. Except for the walk-in enrollment options at local BenePhilly Centers or the mobile unit, all the targeted mailing comes from data on eligibility that is based on individuals already enrolled in a program. For example, relying on the state or local enrollment data to find individuals receiving one service (and subsequently eligible for others) means that those suffering from severe mental health issues, experiencing prolonged homelessness, who have an aversion to public program participation, or who lack legal documentation could be missed. To ensure that this does not undermine the program's fundamental innovative contributions, BenePhilly Centers are hosted by trusted local nonprofits to provide alternative ways of accessing benefits for harder-to-reach populations. Still, this issue is worth further attention in the future.

Replicability

BenePhilly is a highly replicable program, and in 2019 BDT was providing support in some capacity in 11 different states. BDT's call center in Philadelphia was supporting at least six other states in March 2020, and BDT also provided policy advice and technical assistance to five other states. In New York City, for instance, BDT is helping reduce program churn, which occurs when individuals and/or families lose benefit programs they should be eligible for at recertification and must begin the application process over again, resulting in a service gap.

This scalability is due in large part to BDT's tools. The easy-to-use interfaces cover a deeply complex policy database, which makes it simple for new states and jurisdictions to adopt with relative ease and confidence. BDT is also constantly improving its software, incorporating user feedback or updating functions. The staff that uses the tools to help enroll clients are frequently trained on software updates, changing federal and state policies, and human-centered customer service.

Conclusion

BenePhilly is a successful, highly replicable program that alleviates poverty by connecting people and families with the government assistance they deserve. Through data matching, targeted outreach, and software, this program is removing the convoluted, repetitive application burden and efficiently matching eligible individuals with existing benefits and services.

The innovative technology, use of data, and call center are the key components of the program's success and are all replicable in other cities and states. The Philadelphia-specific aspects, like partnerships with nonprofit organizations, use of city employees in the mobile unit, and data-sharing agreements, could be adapted and potentially reimagined in other locations.

BenePhilly is an exceptional and unmatched program that has the potential to expand and transform the landscape of benefits assistance to meaningfully impact generational poverty in the United States. It is for this reason that it is recognized as a finalist for the Innovations in American Government Awards.

Information on the program comes from the February 2020 site visit by Dr. Theresa Anderson, a senior research associate at the Urban Institute, and from the May 2020 interviews conducted by Betsy Gardner, research assistant and writer at the Harvard University Kennedy School of Government and author of this paper.

Notes

1. Sarah Minton and Linda Giannarelli, "Five Things You May Not Know About the US Social Safety Net," Urban Institute, January 22, 2019, https://www.urban.org/research/publication/five-things-you-may-not-know -about-us-social-safety-net.
2. Bruce D. Meyer and Derek Wu, "The Poverty Reduction of Social Security and Means-Tested Transfers," w24567, National Bureau of Economic Research, 2018, https://doi.org/10.3386/w24567.
3. Sara Edelstein, Mike Pergamit, and Caroline Ratcliffe, "Characteristics of Families Receiving Multiple Public Benefits," Urban Institute, February 2014, 13.
4. Amelia Coffey, Heather Hahn, and Yuju Park. "The Intersection of Low-Wage Work and Public Assistance," Urban Institute July 2019.
5. "Broad-Based Categorical Eligibility (BBCE) | USDA-FNS," USDA Food and Nutrition Service, accessed March 31, 2021, https://www.fns.usda.gov/snap/broad-based-categorical-eligibility.
6. Heather Sandstrom and Sandra Huerta. "The Negative Effects of Instability on Child Development: A Research Synthesis," Urban Institute, September 2013.
7. Dorothy Rosenbaum and Stacy Dean, "Improving the Delivery of Key Work Supports," Center for Budget and Policy Priorities, 2011, 93.
8. M. L. Wernecke, Director of Policy and Communications at Benefits Data Trust at time of interview, virtual interview by Betsy Gardner, May 22, 2020.
9. Amy Finkelstein and Matthew J. Notowidigdo, "Take-up and Targeting: Experimental Evidence from SNAP," 2019, 67.

HARVARD Kennedy School
ASH CENTER
for Democratic Governance
and Innovation