

Help on the Way

Communities

Get the Results

They Want from

Peer Matches

A Powerful Approach to Technical Assistance



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I. What are peer matches?

vignette one

Making a Community Partnership Work for Families: A Peer Match between San Joaquin County, California and Jefferson County, Kentucky

Sometimes seeing is believing. Community Partnerships for Families, a coalition of public and private social service agencies and neighborhood groups based in California's rural San Joaquin County, had what members considered a good plan to integrate its programs and staff at neighborhood-based centers.

What it didn't have, according to executive director Stewart Wakeling, was an operating model of community-level service planning and delivery from which it could learn. "We needed a physical picture of what system reform looked like and to hear from our counterparts how integrating neighborhood services had produced a benefit for them," he said. Lacking a concrete illustration of what neighborhood multi-service centers looked like and could produce, Wakeling said that some local agency heads wouldn't buy into the plan, in part because they were reluctant about starting from scratch.

Enter the concept of peer matches. In early 2000, members of Community Partnerships for Families participated in a peer match organized by the Center for the Study of Social Policy (CSSP). The host site for the match was Jefferson County (Louisville), Kentucky and its Neighborhood Place initiative, a national model for community-based multi-service centers. Located in eight low-income neighborhoods in Jefferson County, each Neighborhood Place houses staff from the Jefferson County Departments of Health and Human Services, Jefferson County Public Schools, Seven County Mental Health Services, the Kentucky Department of Community-based Services, and the city of Louisville. Neighborhood Place governing structures—a countywide managing board and a community council for each neighborhood—ensure that partner agencies, community organizations, and residents all share in important decisions.

Wakeling and a group of agency and neighborhood leaders, including the vice president of the area United Way and the heads of both the local child welfare and mental health agencies, flew to Kentucky to learn more about how and why the Neighborhood Place approach works and explore how Jefferson County's experience could be applied to San Joaquin's emerging efforts.

"What was compelling about Louisville is that we saw a neighborhood-based multi-service center in operation, and you could see first-hand a much more powerful approach to problem solving on behalf of families," Wakeling said. The California team observed one of the center's "family success" team meetings and saw the depth of expertise brought to bear to address a family's needs. "There were so many different perspectives at work—advocacy, domestic violence, economic issues. You do not help a family reach its goals in a linear fashion, one inch at a time; you can open up and move on multiple possibilities," Wakeling noted. Although Neighborhood Place staff were clear that this approach to services was initially labor

intensive, the San Joaquin team saw how it produced rapid progress in connecting families to the services and supports they wanted.

Seeing their Kentucky counterparts in action was particularly important for the San Joaquin County agency heads. They were able to register the nuts and bolts processes—policies, case management structures, staff training—needed to put a neighborhood-based center in place. Jane Charmoli, a Neighborhood Place coordinator who served as a peer consultant on the match, said she makes sure that observations of the centers focus on practical day-to-day management, as well as programs and frontline practice. To bring a diverse set of agencies together in a single location, Charmoli says it's important to "get folks thinking about the logistics of collocation—how you do mail, vacation days, who will get the lights on and off, who cleans the facility. These are the 'rubber hit the road issues' that often do not get looked at when you talk about putting these staff members together."

As important, said Dave Erb, deputy director of children's services for San Joaquin County, was understanding how Neighborhood Place's community councils gave a particular character to each center. "You could see the different programs working together, each governed by a different community group. That was helpful in communicating the idea that you do not want seven or eight identical centers—you want them to reflect the neighborhood." Erb heard peers from Kentucky's Child Protective Services agency describe themselves initially as holdouts to the multidisciplinary approach, citing concerns about confidentiality and inefficiency. Then he heard that they now see the benefits and talk about it as a viable approach, allowing them to share responsibility for developing more innovative and aggressive case management strategies. "You could see their true sense of team, which made me think: if they can do it in Kentucky, then we can do it in California."

Wakeling said that gaining the support and advocacy of Erb and other agency officials has helped increase the number of neighborhood-based multi-service centers in San Joaquin County from one in early 2000 to four currently, with plans for an additional three sites.

Intensive preparation, a carefully thought out agenda, talented facilitators, and adequate funding—all key characteristics of peer matches—did more than make the learning exchange effective, Wakeling said. It also sent a message to the participants that they are valuable and their work is important. The time and money that CSSP invested at each stage of the process gave a seriousness of purpose to the match that Wakeling said impressed participants. "The facilitation was well prepared, kept on point, and used our time well. We got a lot of work done," Wakeling said. "I've never experienced anything like that."

SINCE 1995, as part of a broader effort to rely more intentionally on the direct experience of people working in the field, the Center for the Study of Social Policy (CSSP), a Washington-based organization that provides public policy analysis and technical assistance to states and localities, has been working with several partners and funders to make *peer matches* available. Peer matches are structured opportunities for teams of people from two or more jurisdictions who are working on a similar issue to exchange experiences and practical knowledge in order to address a particular challenge that has been identified in advance. CSSP helps those requesting assistance clarify what they hope to accomplish and what they need to learn more about in order to reach that goal. Careful matchmaking brings in people from other places to act as peer consultants and, through facilitated discussion, the group works together to analyze carefully the questions at hand and develop options for action. In this way, peer matches capitalize on the knowledge and expertise of people working on the ground to support families and build strong communities.

The rationale behind peer matches is straightforward: the people best able to provide hands-on help are often the “doers” themselves—people from states and communities who have successfully addressed a challenge or created a strategy that has made a difference. These are individuals who have an acute sense of what has and hasn’t worked. They’ve developed good tools and strategies they can share and are eager to help others because of a strong sense of shared mission.

Peer matches encourage candor among participants and lead to the kinds of exciting, informal sharing of ideas and experiences that often occur in an ad-hoc way when people doing similar work are lucky enough to find themselves together at a meeting or conference. But while good peer matches recreate this sense of informality, they are never casual. Rather, peer matches use a process and structure to focus the common interests, roles, and goodwill that exist

among peers who are committed to producing meaningful change for their communities. Peer matches require intensive preparation, a well-crafted agenda, good timing, clear objectives, and an emphasis on results and accountability. While this approach is time and resource intensive, it is usually not more time consuming or expensive than hiring an expert consultant, and the results that peer matches produce justify the investment.

While the concept of peer technical assistance (peer TA) has always made intuitive sense, recent experience shows just how effective peer matches can be in helping to build the knowledge, relationships, and community capacity needed to help a state or community bring about better results for children, families, and neighborhoods. San Joaquin County’s benefit from the experience of their colleagues in Jefferson County, Kentucky is just one of many examples that illustrates how peer matches help people discover a new sense of the possible and use the learning that takes place when they are with their colleagues to take action in their communities.

To date, CSSP has managed and facilitated over 70 peer matches involving more than 50 states and localities and has enlisted hundreds of people to serve as peer consultants around the country. Regardless of the particular issue addressed, all of the peer matches have had an overarching goal: to promote the development of strong community systems of services, supports, and opportunities that will improve results for children and families. Working toward that goal, peer matches have addressed topics that range from learning how to strengthen community-based efforts around schools, public safety, health, or family economic success to systems change issues such as inventing new forms of professional development for those who serve families, developing innovative approaches to local decision making, and creatively financing family support strategies. For a list of peer match summaries that describe the learning that has taken place on these and other topics see www.cssp.org/major_initiatives/peer_tech_asst.

Highlighting peer matches is not meant to suggest that other forms of community assistance are of less value. Rather, this paper's focus is on promoting a more detailed understanding of why peer matches work, when they are most appropriate, and what benefits that they can offer to participants. Given the right circumstances, peer matches are a powerful form of technical assistance. They help to spread good practice, build relationships among different stakeholders who may not always have a chance to work together, and influence the actions that states and communities take to improve the lives and life chances of families and children living in some of America's toughest neighborhoods.

CSSP's recent experience making peer matches available to communities participating in the Annie E. Casey Foundation's *Making Connections* initiative suggests that this form of peer TA is particularly powerful when it is offered as part of a well-supported comprehensive community change effort. Through *Making Connections*, neighborhood residents and other community leaders in cities across the country are taking a results-focused approach to transforming tough neighborhoods into places where families get the support they need to raise healthy, successful children. The Casey Foundation and local partners in the initiative provide access to a range of technical assistance and support as these communities work to build the capacity needed to manage a resident-driven process for improving results and develop strategies with the scope and scale needed to strengthen neighborhoods and families. In this context—a broad range of stakeholders joined in common purpose to improve results with a commitment to learning about what works and applying that knowledge to new community strategies—peer matches are proving to be an ideal tool for helping people realize what is possible in their communities and building the consensus needed to put in place policies, programs, and funding patterns that can make the vision a reality.

Until now, however, little information has been available to assess when, where, and why this approach to peer technical assistance is a valuable tool for people seeking to improve results for neighborhoods, families, and children. This paper, which updates some early lessons shared in *Learning from Colleagues* (Center for the Study of Social Policy, 1998), is intended to fill that gap. It describes CSSP's approach, experience, and results to date with the aim of encouraging a broader use of peer matches as a valuable strategy to surface and share the practical knowledge and local wisdom that is needed to build strong families and communities.

The discussion is organized around the following questions:

1. What are peer matches?
2. What are the benefits of peer matches?
3. What kinds of results can be expected from peer matches?
4. When is a peer match appropriate?
5. What is the process for making peer matches?
6. Who are the peer consultants?
7. What are the challenges for sustaining and extending the peer match approach?



Peer matches bring together colleagues from different locales or jurisdictions who are well-suited to helping each other. The good fit and an intensive learning process spark an exchange of practical knowledge that results in trusted, credible solutions to shared challenges.

History and Partners

The Center for the Study of Social Policy (CSSP) began its work in this area in 1995 with the creation of a loosely affiliated Peer Technical Assistance Network. A main goal of the network was to expand the technical assistance available to help states and localities that were seeking improvements in their community support systems for families and children. It began with a survey of people working at the state and local levels to determine if they thought such a network was feasible. Finding support for the basic concept, CSSP proceeded to identify and orient an initial group of peer consultants who began providing technical assistance to a few states and localities in 1996. The work has grown steadily since then. Several partner organizations and funders have worked with CSSP at different points in time to develop and make available peer matches. Some of these activities are described below:

- The Council of Chief State School Officers (CCSSO) became a partner to expand the network's capacity to help states and communities ensure education success and build strong school-community partnerships. The National Association of State Directors of Special Education works with CCSSO on peer matches involving educational issues.
- The National Technical Assistance Center for Children's Mental Health at Georgetown University and the Federation of Families for Children's Mental Health have used peer matches to foster community-based, comprehensive systems of care and strengthen family-professional relationships.
- A group of directors of State Automated Child Welfare Information Systems (SACWIS), supported by the U.S. Department of Health and Human Services, linked with CSSP to develop a process of peer technical assistance within the group.
- Casey Family Programs uses peer TA as part of its *Starting Early, Starting Smart* initiative and has worked closely with CSSP in designing and implementing workshops for preparing peer consultants and facilitators.



- The David and Lucile Packard Foundation contributed funds at an early stage in the development of CSSP's peer match approach, allowing this type of technical assistance to be tested as a way of helping communities to improve neighborhood-based service delivery strategies and new forms of local decision making.

- The Edna McConnell Clark Foundation has provided resources for peer matches, particularly to support the development of community partnerships that bring together residents, civic organizations, and public agencies to keep children safe, strengthen families, and increase community participation in child protection.

- The major partner in the expansion of this approach and its testing over a wide range of problems and with many different communities has been the Annie E. Casey Foundation, which has offered peer matches as a core component of its *Making Connections* initiative. To connect participating communities with the ideas, models, and resources they need to improve results for neighborhoods and families, the Foundation's Technical Assistance Resource Center (TARC) has supported dozens of peer matches in *Making Connections* sites to help people develop options for action on issues ranging from building integrated neighborhood services to establishing homeownership programs, creating resident-led governance structures, and developing community schools. TARC engages CSSP as a partner to manage and facilitate these matches. For case summaries of many *Making Connections* peer matches, see the *Peer Technical Assistance Series* published by the Annie E. Casey Foundation and prepared by the Center for the Study of Social Policy. Peer match summaries also can be accessed through the TARC and CSSP websites.

These diverse uses of peer matches all helped to develop and test the utility of the concept. But it is the people who have participated in peer matches who have made the largest contribution to designing, refining, and improving the process. It is in large measure their experiences—and where possible, their voices—that inform this paper.



II. What are the benefits of peer matches?

Peer Matches Share the Benefits of Other Peer Technical Assistance Approaches

Among the variety of ways to assist those who are working to improve results for children and families, peer technical assistance (peer TA) strategies are attracting a strong and growing interest. Peer matches are one of several peer TA approaches that have recently been described in *Peer Assistance: Emerging Lessons* (Center for the Study of Social Policy and the EZ/EC Foundation Consortium, 2003). Despite the diversity of peer TA strategies, they all share several benefits, which helps explain why people in states and communities are “voting with their feet” for more peer learning opportunities.

- *Peer TA capitalizes on the strengths of communities and helps people develop options for action rather than looking for problems that need to be fixed.* Participants have the opportunity to identify the resources and relationships they can build on to achieve the desired results.
- *Peer TA fits the way that adults learn.* Adult learning theory suggests that people learn best within the context of their own experiences and in an environment that balances safety and trust with an optimal amount of the stress that comes from needing to accomplish an important goal. Peer TA meets these needs and enables participants to use their preferred learning styles, frame their own questions, and compare their own work to what others are doing.
- *Peer TA helps build new knowledge emerging from the field.* Making changes for children, families, and communities often means moving into uncharted territory. Working together to combine the knowledge they do have, people can more quickly and efficiently find answers that do not yet exist. This is especially true for work across sectors. Because many of the best solutions require cross-sector perspectives and expertise, peer teams who bring experience in multiple areas may be better suited for the task than subject-specific experts.

- *Peer TA extends the resources available to help people in the field.* The need for assistance is far greater than what is currently available through professional consultants with relevant knowledge and skills—both in terms of sheer numbers and finding the right “fit” to address a particular challenge or opportunity. Creating opportunities for people in the field to both teach and learn from their colleagues, and strengthening their capacity to do so, helps to fill this gap.
- *Peer TA increases the racial, ethnic, and cultural diversity of the sources of help available to the field.* Because the practitioner pool is much more diverse than the traditional technical assistance pool, peer assistance expands the perspectives, experiences, and “voices” that are engaged in assistance. In addition to increasing racial, ethnic, and cultural diversity, peer assistance can expand the participation of families, program participants, and community residents as credible TA providers.

Peer Matches Open Up Possibilities and Prepare People to Move Forward with Change

In addition to the general benefits of peer TA described above, participants in the peer matches sponsored to date by CSSP are nearly unanimous in emphasizing that *peer matches help people develop a new sense of what is possible and equip them with the knowledge and relationships they need to take action on behalf of families.*

People involved in peer matches over the past few years have noted several unique ways that the process helps participants prepare themselves to move forward with change. These include:

- *Knowledge shared through peer matches is based on experience and thus is immediately credible.* Participants in peer matches report that their colleagues “know what they are talking about,” increasing the likelihood that the information shared is not only taken seriously, but also acted on.



“One of the best things about the process is that it’s never real obvious to me who is the learner and who is the teacher.”

— *Diane Arnold,*
Executive Director,
Hawthorne Community Center,
Indianapolis

- *Peer matches are usually characterized by a shrewd sense of the political, fiscal, and bureaucratic context of the situation.* All participants, in their own worlds, have had to resolve political, fiscal, and/or bureaucratic challenges as part of a strategy for change. The recognition of context—and the willingness to strategize about how to deal with it—is an essential component and strength of peer matches.
- *Peer matches create a level playing field for a wide variety of participants.* By creating a climate in which people expand their notion of who is a colleague, peer matches provide a chance for a broader range of participants to work together as equals. Often when people see their peers from other communities engaged in respectful and constructive relationships, they are able to reassess the way they relate to their own colleagues and begin to overcome any “baggage” they are carrying in their own relationships. By working together to identify and meet common learning objectives, participants often end up with a different sense of who has the knowledge, credibility, and clout needed to make a difference for families and their children.
- *The focus is on learning from colleagues and helping everyone get the best results.* Because they are not there to sell their services, participants in peer matches do not see each other as having hidden or competing agendas. In addition, the reciprocal nature of the learning that takes place makes it less likely that anyone at the table will feel that a lack of knowledge on a particular subject is a sign of inadequacy or failure.
- *Peer matches promote candor.* Peer match participants are very honest with each other about failures as well as successes because of the structure of the process. The process gives them the time, space, and inclination to analyze difficulties and barriers as a way to discover keys to a successful strategy.
- *Peer matches have a motivational effect.* Participants very often report that peer matches help them to develop a keener sense of their own abilities to succeed, saying, “They did it, so can we!” Because participants feel supported by their peers, peer matches often generate a chemistry that motivates people long after the match is completed.

How Adults Learn

Tests have shown that people remember 20% of what they hear, 40% of what they hear and see, and 80% of what they discover for themselves.

One of the reasons why peer matches work so well is that they are aligned with adult learning principles and best practices. In adult education, the creation of a good learning situation takes into account the psychological needs of the adult learner. Pioneers of adult education methods, such as Malcolm Knowles and Paulo Freire, make the following major points about adult learning psychology:

- **Adults have a wide experience and have learned much from life.** They learn most from their peers. Adult educators should create a situation conducive for each person to have an opportunity to take an active part in the discussion.
- **Adults have a sense of personal dignity.** They must be treated with respect at all times and never feel humiliated or laughed at before others.
- **As adults grow older their memories may get weaker but their powers of observation and reasoning often grow stronger.** In contrast to traditional approaches to education based on the transmission of knowledge from teacher to pupil, problem-posing approaches to adult education view education as a common search for solutions to problems. From the beginning, all participants are recognized as capable and creative people with the capacity for action. The role of the teacher is to set up a situation in which genuine dialogue can take place.
- **Adults are interested in and learn quickly about those things that are relevant to their lives.** The adult educator needs to create a situation in which the participants can share in the planning, choose the topics, and participate in regular evaluation of what they are doing.

Adapted from Anne Hope and Sally Timmel,
Training for Transformation: A Handbook for Community Workers,
Zimbabwe: Mambo Press, 1984.



A team from San Diego's Bronze Triangle Community Development Corporation tour and learn about several housing and business development projects, direct-services programs and neighborhood institutions during a peer match with colleagues from four East Coast-based organizations.

III. What kinds of results can be expected from peer matches?

THE TECHNICAL ASSISTANCE provided through peer matches focuses on helping people get the results they seek. When helping participants develop the specific learning goals and objectives for a peer match, CSSP always begins by helping them clarify the desired change in conditions for neighborhoods, families, and children. With assistance from a facilitator and from peers in other parts of the country, participants then have an opportunity to identify the new information, resources, and relationships they think will be needed to achieve these results.

When peer matches are effective, they help people work smarter, faster, more in depth, and with more of the right partners. And, it is the new knowledge, relationships, and resource development strategies that are built during peer matches that, in turn, affect the results that communities can achieve for children, families, and neighborhoods.

For example, in 2001, several local partners in the Louisville *Making Connections* site were interested in finding ways to promote family economic success by increasing family assets. To support their emerging interests, CSSP, as part of the Casey Foundation's Technical Assistance Resource Center (TARC), arranged for a number of communities to take part in a peer match with the Community Action Project of Tulsa, Oklahoma, a local nonprofit agency. The Community Action Project has developed perhaps the most ambitious program in the nation to help working poor families avoid expensive tax preparation, maximize refunds, and begin saving for the future.

With the knowledge and momentum gained from the peer match, local leaders in Louisville created a new Asset Building Coalition to focus on issues of tax credits, financial literacy, and savings. The Asset Building Coalition launched an extremely successful Earned Income Tax Credit (EITC) effort that resulted in 635 tax returns filed with a total of nearly \$800,000 in EITC claims returned to local taxpayers. In 2003, the Louisville Coalition expanded to ten neighborhood-based Volunteer Income Tax Assistance (VITA) sites. The effort resulted in 1,367 returns, \$1,889,174 in refunds (\$922,457 EITC) and an estimated \$341,000 in

tax preparation savings. Furthermore, 100 people are using \$270,000 in refunds for Individual Development Accounts (IDAs), debt reduction, and savings. Forty-nine new bank accounts were established, and two homes were purchased with EITC refunds. The Asset Building Coalition now has over 100 members and plans to expand its EITC effort in the coming years. Louisville is also returning the favor of peer match support, having hosted groups from Providence, Rhode Island and Charleston, West Virginia while also sharing insights during visits to Atlanta, Georgia and Oakland, California.

While the peer match approach has not been formally evaluated, learning about the results of peer matches in *Making Connections* has been a major focus of TARC. During the past two years, with the help of Community Development Associates (CDA), a consulting firm that specializes in community change initiatives, TARC has developed a learning and assessment strategy in order to know how effectively technical assistance is being delivered across the *Making Connections* sites. As part of that work, through observations and interviews with participants, CDA has gathered considerable qualitative data that illuminate the results that can be expected from peer matches and how they contribute to community efforts to improve child and family outcomes.

CDA's interviews look at the quality of peer matches, i.e., how well they were conducted, as well as their overall impact. Regarding quality, 100 percent of peer match participants interviewed for CDA's 2002 report expressed satisfaction with the overall quality of the matches. Regarding the overall impact of peer matches, CDA found that peer matches were associated with *several* results, from relationship building to capacity building and specific actions taken by participants following a match.

Peer Matches Increase Participants' Knowledge and Help Them Develop Options for Action

The exchange of information, knowledge, and experiences is at the heart of the peer match process. The information shared ranges from nuts and bolts design and operational issues to more



New Learning

Working in partnership with neighborhood, government and private organizations, White Center/Seattle *Making Connections* is putting in place strategies to help families connect to economic opportunities, social networks, and quality services and supports. In March 2003, a White Center team composed of neighborhood residents and representatives from service agencies, community organizations, and schools participated in a peer match with two service integration initiatives in California: the Human Services Agency in San Mateo County and the Fremont Family Resource Center in Alameda County. The White Center/Seattle team wanted to learn more about how these programs worked on the ground in order to identify and assess options for influencing the development of a resident-friendly, integrated neighborhood services model in White Center. Participants came away from the match with a definite sense that “it can happen” and “a clearer sense of what can be achieved.” They acquired new knowledge about the combination of strategies employed—from co-locating staff in one-stop offices to integrating intake and assessment, creating multidisciplinary teams and braiding funding streams—and the critical success factors that facilitate their implementation, such as strong leadership, a clear mission, and a willingness to take chances. Upon returning from the peer match, the group met several times to distill its learnings and articulate a common vision for moving forward, which it then used as the basis for a community charette designed to translate this new knowledge into new ways of delivering services in White Center.

complex analyses of how the conditions were put in place to enable a new policy, strategy, or activity to make a difference. For instance, during the course of peer matches, participants have the opportunity to learn how others have staffed and financed new strategies and how they’ve built and sustained important partnerships. Participants also learn how others have developed the popular and political support needed and how they’ve helped people develop the skills and capacity to work differently and more effectively on behalf of families. An important part of the sharing is dissecting approaches that weren’t successful and the lessons learned from those “thoughtful failures.” The group then considers the strategies, experiences, and lessons learned that have been shared and think together about how they might be adapted in a new context.

Peer Matches Build and Strengthen Relationships

Peer matches help build and strengthen relationships among those who are working together in communities and between colleagues around the country who have a common purpose. These relationships are built not just among traditional power brokers, but also among a wide range of people with a stake and interest in their community, including neighborhood residents, representatives of community-based organizations, state and local government officials, and business leaders.

These groups do not always have a history of working together, and forging productive relationships among them is a key aim of community change initiatives. Peer matches take advantage of the intensity of the experience to forge strong—and often lasting—bonds in a short period of time.

Participants in peer matches have reported that these new or strengthened relationships serve a variety of functions including: facilitating access to resources and information; providing greater influence on decision-makers and greater leverage to demand action; and endowing local actors with greater credibility because they can demonstrate external validation of the approach they are advocating. In addition, relationships developed during peer matches often are long lasting, providing on-going peer support and consultation.

The New Knowledge and Relationships Acquired During Peer Matches Influence What People Do Next

Armed with a new sense of what is possible and a common commitment to taking action, people involved in peer matches are able to take what they've learned and apply that knowledge to their efforts to improve results in their communities. Each peer match ends with time set aside for participants to reflect on what they are taking away from the match and to make individual and collective commitments to action. Early in the development of CSSP's peer match approach, staff would check in with participants after three to six months and found that people followed through on action commitments with surprising frequency.

The interviews that CDA conducted with peer match participants over the past couple of years confirm this trend. Action sometimes occurs quickly. For example, ideas garnered during the course of a peer match show up in the design of new programs, or funders who participate in matches contribute resources to test a new approach. Other times the effects take longer to show up: e.g., a pilot project that served a limited geographic area is taken to scale over time, or families are more often and more substantively engaged in program design and operation.

The context in which peer matches occur also appears to contribute to people's ability to act on what they learn during a match. For instance, people who participate in matches that take place as part of *Making Connections* are involved in a larger community change effort that has additional supports in place that encourage the kinds of policy and practice changes that match participants work together to design. Often they can count on receiving additional help and assistance in translating promising new ideas into action. The vignettes included throughout this paper provide examples of the ways people have translated the knowledge and relationships gained through peer matches into concrete action on behalf of neighborhoods, families, and children.

Relationships Built and Strengthened

A key goal of *Making Connections* is to increase family economic success, which occurs when families have ongoing opportunities to build a sustainable base of economic security. In June 2002, a group associated with Lao Family Community Development in the *Making Connections* site in Oakland, California, engaged in a peer match with members of the International District Housing Alliance in Seattle, Washington. Lao Family had recently launched a Multilingual Homeownership Center to address the low rates of homeownership among refugee and immigrant families in the community, particularly Southeast Asians. The Oakland group sought guidance from their Seattle colleagues who run a successful homeownership program serving a similar community. The match helped the group from Oakland make decisions about the design of the center, the staffing configuration, the necessary skill sets of the staff, and its management information system. Another important outcome was the relationship established between Oakland and Seattle. Staff members from Lao Family are now in regular contact with the group in Seattle for advice and information. The match also resulted in a stronger relationship between Lao Family and city government, initiated by the inclusion of city staff as part of the peer match team. After only a year of operation, the Multilingual Homeownership Center has already assisted several families to buy homes.

Actions Taken

In July 2001, the Mattapan Community Partnership in Boston, Massachusetts did a peer match with Philadelphia's Germantown Community Collaborative Board to discuss strategies, experiences, and lessons learned related to developing a resident-led governance structure. Participants interviewed by CDA reported that the groups representing each community at the peer match were both quite diverse and able to identify many common strengths and challenges. With the information gained from the peer match, the Mattapan Community Partnership was able to create a strategic plan and launch a "community ambassadors" program that supports block captains and residents to be leaders in their communities.



Creating Better Connections between Neighborhoods and Schools: A Peer Match between Indianapolis, Indiana; New York City; and Baltimore, Maryland

Diane Arnold remembers when her community just wanted a school. After all, a federal desegregation order had resulted in the closure of every public school on Indianapolis' near Westside. Arnold, director of a local community center, was part of an education task force the neighborhood formed in 1997 to lobby for a new school when the desegregation order was lifted.

But that all changed when Arnold and other task force members participated in a peer match in early 2000 with "community schools" in New York City and Baltimore. Knowing that there was an opportunity for the education task force to have an impact on how a new school would operate, the Indianapolis *Making Connections* effort offered to help task force members explore how other communities have transformed schools into neighborhood anchors, providing not just a quality education but also a menu of resident-driven services and supports, including health care and counseling, youth and recreation programs, job training, English as a Second Language (ESL), and adult literacy classes.

The peer match was just what was needed to give the task force members a sense of what was possible. "Had we not gone to New York and learned about the models they used there, we would have been content to have a school open six hours a day," said Arnold.

But she and her peers saw that "you could have a health center, you could have adult education, and we came back and embraced that model, that whole concept of what a school could be for a community. It was like taking the blinders off."

The task force led to the creation of Washington Community School, which now occupies a formerly shuttered neighborhood high school and offers more than 400 families an on-site health clinic, full-day kindergarten, afterschool programs, child care, tutors from nearby universities, and a full range of adult education programs. In addition, the school's recreational facilities, including a swimming pool and basketball courts, are open year round to the community, and rooms are available for use by parents and community groups.

The creation of the community school brought new challenges and questions, and the task force wanted to learn even more about making improvements for its community. *Making Connections* offered a second peer match between an Indianapolis team and the Children's Aid Society Schools in New York. This match focused specifically on integrating social and recreational programs with the school's educational goals and preparing Washington Community School to become a full-fledged high school in the next several



years. The task force is also helping design plans for a new elementary school in the community and has challenged the location chosen by the local school board. “We now feel powerful enough to say not only what the school should look like but that we want it centrally located,” says Arnold.

The peer matches, she says, “have created a monster”—a group of local leaders, residents, and families who command the attention and respect of local officials. Arnold said one local university used to come into the neighborhood with the attitude that “they wanted to fix us ... we were a learning lab for them, and they used to study us and feel good about what they have done for us.” But those same people have been “humbled by this whole process of community development and resident involvement,” she said. “There is a 100 percent change in the folks who come to the community. The first thing they say is ‘What can we do to help you?’”

Arnold said the initial peer match, hosted by the Children’s Aid Society and one of New York City’s Beacon Schools and involving Baltimore’s New Song Academy, underscored just how great an asset the community’s strong relationships would be in creating a community school. “What I learned is that there were some things we were ahead of the curve on,” Arnold said. “In New York they had

to create partnerships and get folks to the table, but on the Westside there was already a vast cadre of advisors, and we did not have as many turf issues. When they talked about their pitfalls, we had gotten beyond that.”

But the match also offered a view of what could be, Arnold said. She went in worried about whether, and to what extent, social service providers could occupy the same workspace with teachers and principals. “Anytime we deal with a family it is not in a vacuum, other organizations are involved,” she said. “But sharing information can be sticky, especially at school with lots of rules and regulations.” Yet in New York, Arnold said it was refreshing to watch service providers “going to get kids out of class and taking them to the clinic and getting medical treatment,” without getting bogged down in red tape. “It was just like part of the school day,” Arnold recalls. “It was not a big disruption ... it made us think we could do that, too.”

Peer matches help people interested in community change avoid wasting time by reinventing the wheel, Arnold said, but they also don’t advance “a cookie cutter approach ... it is not about replicating. You see what is good, how it could be molded and shaped to your situation.”



IV. When is a peer match appropriate?

GETTING THE KINDS OF RESULTS described in the previous section depends in large part on making sure that a peer match is the right kind of assistance to help a group of people achieve their objectives. For this reason, and because peer matches require substantial investments of time and resources, careful consideration of when and how to use this approach is always warranted.

The first thing to consider when assessing a request for peer matches is whether it is the most appropriate way to provide help. Experience over the past five years has shown that peer matches work particularly well when the following conditions and circumstances are in place:

- *A specific challenge has been identified, and people are at a key decision point in the design or implementation of a solution or strategy.* Peer matches are most effective when participants are past the stage of exploration and have committed to the design and possible implementation of a strategy to address a challenge that lends itself to being solved through the thoughtful application of field-based knowledge and experience. For instance, CSSP has arranged peer matches for several *Making Connections* communities that had recently made a commitment to implement Time Dollar, a strategy to strengthen social networks and build social capital in their neighborhoods. Linking them with similar communities that had several years of experience with the Time Dollar approach greatly accelerated their efforts and prevented them from having to reinvent the wheel in order to achieve their goals.

When a community is just exploring whether they are interested in a particular approach, less intensive learning strategies are usually more appropriate. For example, CSSP once received a request from a community that was interested in starting a family resource center. The community's questions about start-up, operations, and funding seemed at first to indicate that a peer match might help it learn what it needed to implement this strategy. However, closer questioning revealed that the result the community

was seeking was to help residents get jobs and provide better services and supports to working families in a particularly tough neighborhood. Instead of going forward with a peer match right away, CSSP shared a variety of materials with that community about family resource centers, the kinds of supports they are generally able to provide, and the kinds of results some evaluated programs have achieved. The community decided that a family resource center might provide some of the supports it was seeking for residents and working families, but was probably not the first strategy it would invest in and sought additional help to learn more about how to bring together a range of work and family supports.

- *Stakeholders are invested in, and thus have a high degree of ownership in, working to achieve a common objective.* When several folks at the table have an urgent need to resolve an issue or achieve a specific result, peer matches are more likely to lead to concrete action. A good example of this is a recent match involving a community schools coalition in White Center, Washington. White Center is a *Making Connections* site that has placed a high premium on increasing the ability of parents to participate in efforts to improve the quality of their schools. The *Making Connections* effort provides support to the community schools coalition as a key strategy to help build this capacity. In 2002, after several unsuccessful tries, the community passed a bond for new school construction. Both the residents on the coalition and representatives from the school district knew they would have to act quickly in order to influence the design of a new neighborhood elementary school. A peer match between White Center and Long Beach, California gave the coalition and other community partners the opportunity and information they needed to work together quickly to start designing a school to meet the needs of the community.

A high degree of investment translates into working hard at solutions. A recent example is a match that focused on creating a neighborhood

design center in Hartford, Connecticut. With support from Hartford *Making Connections*, a team from Hartford visited Baltimore, Maryland in November 2002 to discuss the design center concept with representatives from the Baltimore Neighborhood Design Center and a team from Lawrence CommunityWorks, who flew down from Lawrence, Massachusetts to participate. The discussion focused on the creation of a design center in Hartford as part of the broader strategy developed by the Mayor's Homeownership Task Force to address the problem of low homeownership rates in the city. Hartford agencies represented included the Court of Common Council, the Homeownership Task Force, the City Manager, the Local Historic Commission, the Hartford Foundation for Public Giving, and staff from City Planning and Economic Development. Only three months after the match, the group was able to reach consensus on a concept, bring in other key stakeholders, and elaborate a proposal toward the establishment of the design center. Shortly afterward, the Council passed a resolution instructing the city to facilitate the implementation of the recommendations contained in the proposal.

- *The timing is right.* Peer matches are most productive when those who request them are poised to act on what they've learned, as when a decision or action that will affect the community's family strengthening agenda is going to be taken or someone needs to be convinced to take action. For instance, in response to the mayor's interest in community-oriented policing, the Louisville Police Department established a police-citizens committee to develop recommendations for implementing a strategy. The committee was struggling with its work when the opportunity was provided by *Making Connections* to attend a peer match to learn from another city's community policing efforts. Members of the committee worked with the *Making Connections* site team members and community policing experts recommended by TARC to select an appropriate city for the peer match. A group of ten local stakeholders (half police, half residents)

was hosted in Savannah, Georgia by local officials and residents for two days. Based on insights from the peer match, a strategic plan with recommendations for community-oriented policing was modified and submitted to the mayor. The match was timed to precede a community forum in order to allow participants to present and share their learnings and plans for action with a wider audience.

By contrast, another peer match involving two states that were working across agencies to reform and make more effective their education and human service agencies never came to fruition because of poor timing. Both states were set for an exchange that would delve into strategies for promoting shared accountability among multiple state agencies and for sustaining state and local partnerships. However, as the match was being planned, an unexpected crisis in one of the states caused the match to be postponed. Shortly thereafter, both states' legislative sessions began, which prevented the key players in each state from traveling. Decisions made by the legislature in one of the states forced a serious rethinking of its systems reform effort, which eventually made the postponed match a moot point.

- *A reasonably small number of people have the credibility and authority to act on what they learn in the match.* Peer matches are most productive when they involve people with the credibility and clout that enable them to follow up, make decisions without delay, and convince others to join them in their work. If implementing the "next step" depends on dozens of people in many different agencies and organizations or different levels of the community, a peer TA match may not be the most effective way to proceed. While the match participants may gain new knowledge that helps them solve "their part" of a problem, critical people who are not part of the match can still stymie real progress. The peer match on community partnerships between San Joaquin County, California and Jefferson County, Kentucky, described in this report's opening pages,

illustrates this point. In this case, having the heads of the local child welfare and mental health agencies attending the peer match was extremely helpful not only for them buying into the plan, but becoming effective advocates for establishing neighborhood-based multi-service centers in San Joaquin County.

In addition to trying to determine whether the above conditions are in place, the following principles are suggested as a guide for assessing when peer matches are appropriate. First and foremost is the connection of a peer match to results; i.e., the extent to which what a site wants to learn is likely to help it achieve its desired end. Requests for peer matches must provide an indication of clear commitment and ability—based on the assistance received—to make changes to produce results that will benefit children and families. In assessing a request for a peer match, the first priority is to clarify the purpose of the match. What are the issues that the requesting site wants to learn more about? What is driving this particular need to learn? What background situations and occurrences have led to this request for assistance and identification of these issues? Who are the people who could cause something to happen?

In addition, CSSP looks for evidence that a peer match meets the following criteria:

- *Involving a diverse mix of stakeholders:* Peer matches work best when they include individuals who are critical to implementing change successfully, both as receivers and providers of assistance. Because the peer matches are aimed at improving results for children and families, a high premium is placed on involving family members and other community residents in matches. For example, in the fall of 2002, the Northeast Denver Parent Organizing in Education Initiative (NEDPOE) sought a peer match with the Boston Parent Organizing Network (BPON) to gain understanding of other models and strategies that it could use in its work to elevate the voice of parents as strong partners in school reform efforts. The objectives identified by the Denver group

included learning about successful strategies for parent organizing, particularly with African-American families, and learning about shared organizing across schools and churches. Accordingly, the lead contacts involved in the planning of the match made sure that the participating teams from Denver and Boston included African-American parents and leaders from local schools and churches.

- *Seeking opportunities for learning across traditional boundaries:* Although the subject matter of matches spans a range of topics, none of the solutions the participants are seeking can be implemented without joint work by people with a range of backgrounds. CSSP seeks to support peer matches on topics that favor cross-system solutions and bring together people with diverse experiences and different worldviews in order to address challenges and develop new options for action. For instance, a number of matches sparked among *Making Connections* sites have focused on helping communities develop resident-led approaches to ensure that children have health insurance and access to good health care. At different points in time, teams from San Diego, California, Des Moines, Iowa, Washington, D.C., and Richmond, Virginia engaged in peer matches with representatives from the Walkers and Talkers program in New Orleans, Louisiana, which has a strong track record in this area. The visiting teams comprised neighborhood residents, representatives of settlement houses and other community-based organizations, community organizers, city officials, and staff from state and local Medicaid offices.

V. What is the process for making peer matches?

PEERS CONSTANTLY SHARE EXPERIENCES

with each other. After all, the chance to compare notes and exchange strategies is what brings people together all the time in workshops, retreats, and conferences. The challenge in peer matches is to structure exchanges among peers that are responsive to their needs and simultaneously effective in keeping people focused enough to think about how they can apply what they are learning.

Careful preparation and execution of the match greatly increases the likelihood of success. Match activities are supported from beginning to end by an experienced facilitator—a staff person or consultant provided by CSSP—but it is the people requesting assistance and the peer consultants who are the key players in the process. In setting up a match, the facilitator seeks to maintain a balance between using procedures that have yielded productive matches in the past and remaining flexible enough to respond to each site's unique needs and circumstances. Sometimes this process can be fairly linear; sometimes there is a need for much more iteration. The steps used to plan and conduct a peer match and core questions to consider in each of those steps are included in Figure 1.

Qualities of an Effective Peer Consultant

Experience has shown that effective peer consultants:

- Understand that the aim of peer consultation is to help colleagues arrive at their own solutions to solve their problems, not to solve their problems for them or replicate any one model.
- Have substantive, hands-on expertise on the focus issues.
- Are able to apply principles learned from their own experience to the specific circumstances of the TA recipients; i.e., the peers who requested the technical assistance.
- Take time to learn about the politics and environment of the site they are assisting.
- Enter readily into a collegial relationship with TA recipients.
- Pose thought-provoking questions to help TA recipients tease out their problems, issues, and goals.
- Listen and communicate effectively.
- Are culturally sensitive and capable of constructively addressing issues of race, ethnicity, class, and power that may arise.
- Motivate and inspire TA recipients.

Developing a Focused Agenda

Shaping an agenda that gets the desired results for a match can require some digging and discipline. "Sometimes you come up with too many issues," says Caroline Gaston, an experienced peer match facilitator. "That is where the conference calls come into play because the peer consultants often tell them [the requesting site] that they cannot do all that at once," Gaston says. "Building consensus on a given set of results is iterative," notes Beth Leeson, another veteran peer match facilitator. "It is a process where you start with what folks think they want, and you keep massaging that and fine tuning it. As a facilitator, I keep reminding people how much time we have and ask what we want to walk out of the match with ... it takes the concentration of saying 'If we have these five blocks of time, what are the five most important questions you want answered?'"

Figure 1. The Process of Making Peer Matches

STEPS	CORE QUESTIONS
<p>1. Clarifying the purpose, timeline, and team composition</p>	<p>The facilitator helps the requesting site clarify the learning objectives, appropriate time frame, and participants:</p> <ul style="list-style-type: none"> • What are the issues that the requesting site wants to learn more about? • What do the participants hope to gain from attendance at the match? • What is driving this need to learn? • Are there certain events or actions that need to happen before the match occurs? • Is there a deadline coming up that dictates the need to have the match by a certain time? • Who are the people who can cause something to happen? • Is there a role for parents and residents as part of the peer team?
<p>2. Finding a good match</p>	<p>The facilitator helps to make sure participants are matched appropriately:</p> <ul style="list-style-type: none"> • Does the peer consultant organization or program have a record of success addressing the issues relevant to the match? • Does it have hands-on experience with similar populations? • Can it pull together a team of individuals that substantially mirrors the team from the requesting site? • Are these individuals available and willing to serve as peer consultants?
<p>3. Framing issues and creating the agenda through pre-match conference calls</p>	<p>The aim of the pre-match planning calls is to ensure that people arrive at the match with a common understanding of the background and purpose of the meeting, develop a focused learning agenda for the match, and begin the get-acquainted process:</p> <ul style="list-style-type: none"> • Have the issues been sharpened or clarified since the initial conversations? • What results are expected from the peer match? • Are there any written materials that need to be shared in advance of the match? • Do the peer consultants understand and accept their role as peer consultants? • Are there any additional questions or concerns related to the learning objectives? To the match?
<p>4. Conducting the actual match</p>	<p>While there is no prescribed formula, the following questions must be addressed:</p> <ul style="list-style-type: none"> • Is the match facilitated by a skilled and neutral facilitator? • Is time provided for social interaction and personal sharing early in the match? • Does the format allow for exchange and application of insights to address the challenge at hand (rather than show and tell)? • Is time provided for a wrap-up session where participants can identify key learnings and next steps and make commitments to follow through?
<p>5. Writing-up the match products</p>	<p>The facilitator prepares the match products that summarize the results of the consultation, including:</p> <ul style="list-style-type: none"> • What were the background and context for the match? • What were the participants' main observations and lessons learned? • What decisions and next steps did the participants agree to pursue in order to move forward with their vision?
<p>6. Checking in with participants</p>	<p>The facilitator contacts participants soon after the match and checks back informally after 3 to 6 months to determine:</p> <ul style="list-style-type: none"> • What progress has been made on next steps identified during the match? • What has been the impact of the match? • Are there any requests for additional information or need for any informal exchange among the parties?

Step 1. Clarifying the Purpose, Timeline, and Team Composition

After a request for help meets the criteria described in the previous section, and the requesting site agrees it wants a peer match, an experienced peer match facilitator is assigned to manage the process. The facilitator's first step is to initiate a conversation with one or more lead contacts in the requesting site about the issues they want to learn more about and the results that they want to obtain from the peer match. Critical questions to be covered at this stage include:

What are the desired results for the peer match? A critical first step is determining what the requesting site hopes to gain from the match and identifying the key learning objectives. Core questions that the facilitator poses at this stage include: What is driving the need to learn? What will be different for children and families if the match is successful and the participants are able to act on what they learn during the exchange? What are the specific issues that the requesting site wants to learn more about? What occurrences and opportunities led to the request for assistance at this time? The aim here is to help the requesting site refine and focus the learning objectives for the peer match.

What is the target time frame for the match? As noted before, peer matches are most effective when their timing is propitious. Therefore, the facilitator helps determine if there is any upcoming event, decision, or deadline that should frame the timing of the match. Also, are there any events or actions that must take place before the match? How quickly after a match can the participants put the plans they make into action? With this information in hand, a target time frame for the match can be set. The facilitator then works backward from this timeline to determine a schedule for other pre-match activities.

Who needs to be at the table? The facilitator also encourages the requesting site to think further about the ideal composition of the team to attend the match. Who are the action agents that can cause something to happen? Are there relation-

ships that need to be cemented, therefore suggesting that certain people be invited to attend? Is there a role for parents or residents who are affected by the issues that are being discussed? The number of people in a team varies for each match, usually ranging from three to ten participants.

Step 2. Finding a Good Match

Once the learning objectives and desired results for the match are defined, the next step is to identify the appropriate initiative, organization, or program for peer consultation. The match facilitator works with the requesting site to generate suggestions as to who the potential program or initiative for the peer match might be and/or who can help identify the best peer consultants. Often, the requesting site has an idea about another community or initiative and/or the right people within that initiative it wants to work with during the match. While these ideas generally are on target, the match facilitator is responsible for investigating further and making his/her own determination about whether it is the right match. Sometimes, facilitators propose alternative or additional peer consultants as a way to ensure that the learning objectives for the match are fully met.

In a peer match, the aim is not replicating one site's approach in another place but creating a strategy that will work best for a specific locale or jurisdiction. Thus, it is sometimes useful to draw on a team of peer consultants from different sites that have used a range of approaches to address similar issues and concerns. For example, in August 2001, in response to a request from the Bronze Triangle Community Corporation in San Diego to learn about creating resident-led community development corporations, CSSP arranged a peer match with four organizations that are well-versed in organizing around a range of neighborhood development issues: Lawrence Community Works, New Community Corporation, Dudley Street Neighborhood Initiative, and the Massachusetts Association of Community Development Corporations. Over four days, a team assembled by Bronze Triangle met with staff, community partners, and residents

affiliated with each of the four host agencies to address a set of previously identified learning objectives. By pooling multiple experiences, the requesting site got the full range of experiences and ideas it needed.

Matching people in similar roles is another important consideration. People can more readily identify with the peer consultants and resonate with specific challenges and issues they might face because of the particular role that they play, be it as a government official, a director of a community-based organization, or a neighborhood resident. In addition, CSSP encourages the participation of parents and community residents in both the requesting and peer consultant teams whenever possible, in order to bring their voices, perspectives, and experiences into the peer match process and resulting plan of action.

In sum, a key ingredient of a successful match is finding peers whose expertise makes them credible to the requesting site in working through its learning objectives and developing an action plan. Among the questions considered when selecting peer consultants are:

- Do the peer consultants have a record of success in addressing issues relevant to the match?
- Do the peer consultants have hands-on experience that is similar enough to what the requesting site is looking for so that their advice will be credible?
- Have the peer consultants demonstrated an awareness of culturally appropriate practices and considerations relevant to the results being sought by the requesting site?
- Can the peer consultants pull together a team of individuals that substantially mirrors the team from the requesting site, and will those people be willing to commit the time necessary to act as peer consultants?
- Is there a role for parents and/or residents to serve as peer consultants?

After the lead peer consultants are identified, the facilitator briefs them on the issues and time frame for the match and shares information

about the peer match process, its underlying principles, and the investment of time necessary, in order to help determine their interest and availability. Those who agree to participate work together with the facilitator to help assemble a team of peer consultants that closely matches the team of participants from the requesting site.

It is extremely important for the facilitator to orient peer consultants about the peer match process and how they can be most effective in their consultant role. All those who agree to participate receive descriptive materials about the peer match approach in advance. The facilitator also devotes some time at the beginning of the match to orienting participants. Avoiding a show and tell format and asking effective questions are two critical messages to convey to peer consultants. Sometimes peer consultants are able to participate in special peer consultant training sessions that CSSP has conducted together with some of its partners. The section below on Who Are Peer Consultants? identifies attributes that effective peer consultants share and highlights lessons learned about helping people build peer consulting skills.

Step 3. Conducting Pre-match Conference Calls to Frame Issues and Create the Agenda

The facilitator arranges multiple conference calls to ensure that all involved enter the match with a common understanding of the learning objectives and any important background and context that will help illuminate the issues being addressed. Initial calls may begin with an individual or small group from the requesting site, but subsequent conversations usually grow to include the full group of participants. The facilitator distributes notes from each call to all participants, and the notes are also used to help shape the match agenda. The pre-match conference calls are especially important because they begin the get-acquainted process and help build trust among the participants, clarify expectations, finalize the participants from all sites, help identify written materials that can be shared in advance, and provide the opportunity to develop a jointly-owned agenda.

Participants share and learn best when they are comfortable and prepared. Prior to the match, the facilitator makes sure that the team members know what the appropriate dress is, where they are meeting, and if they are making any site visits (and may need, for example, to be prepared for extensive walking). This information is helpful to everyone, but especially residents who may not have a good sense of what type of clothes to bring or what to expect. Materials sent in advance of the match can help prepare participants with additional knowledge, such as information about the other peers' roles, their accomplishments, and their challenges. Each team can be asked during a conference call to describe any materials it might wish to share, and if others agree these would be useful in advance, they are distributed for pre-match, airplane, or other travel reading.

Step 4. Conducting the Actual Match

Peer matches are most often hosted by one of the peer consultant communities, since in many instances the match includes tours and onsite observation. Most peer matches take roughly two working days. Because relationships are so important in peer matches, a typical agenda begins with an opening reception and meal. Activities to get acquainted during this event are important for building the group trust needed to work and learn together during the rest of the match. The opening event is usually followed by one-and-a-half to two days of work together. Sometimes it is helpful to include site visits in the agenda so that people have an opportunity to see a strategy in action. In other cases, the time is better spent in focused problem-solving conversations.

While there is no prescribed formula for structuring a successful match, it is particularly important to pay attention to the following components:

Devote time for social interaction and personal sharing early in the match, preferably as the opening activity. This time builds a feeling of openness and trust that is essential for later

productive work. In addition to the opening activity, be intentional about setting aside dedicated time for informal conversation throughout the match—whether it is a lunch or dinner out or a special event.

Create opportunities for participants in similar roles to interact with each other. A carefully selected team, one that “matches” with the other team(s), will help everyone identify with their peers more readily. For example, if residents and city council members are attending the match, make sure they meet and have the opportunity to share with residents and city council members on the other team.

Prepare in advance a well-crafted agenda in consultation with the participants. The agenda helps maintain a focus on the match's learning objectives. Because there are usually so many substantive areas about which the group can share experiences, the facilitator plays a key role in reminding participants of their priorities, and frequently giving them the choice of returning to those priorities.

Provide comfortable surroundings and a set-up conducive to balanced, interactive discussion. Research has shown that the arrangement of the room has a strong effect on the participation in a discussion. Always use a u-shaped set-up or stagger tables in a manner that allows everyone to see everyone else's face.

Provide skilled facilitation by an individual perceived by participants as neutral. Almost always, the facilitator is also the person who helps prepare for the match. In addition to regularly expressing appreciation for people's time, energy, and contributions, and clarifying and validating participant input, peer matches work best when the facilitator “teases out” sufficient discussion on key topics so that the discussion moves forward to resolve the agreed-upon issues.

Assist peers in playing the role of consultants. Many people have been trained to present at workshops and conferences, but haven't been

trained to be peer consultants. The facilitator must provide this gentle guidance, always encouraging the peer consulting team to listen to the needs and dreams of the other team and then respond to its questions and issues within the context of what it needs to learn (which isn't necessarily what the peer consulting team would typically present at a workshop).

Provide time for reflection and commitment to follow-up actions. Peer matches close with a wrap-up session where participants have an opportunity to highlight key learnings, identify next steps, and make commitments to a plan or set of actions. This wrap-up session cements the accomplishments of the match in people's minds and also sets the stage for follow-up activities.

Step 5. Writing up the Peer Match Products

Most matches have two types of products: a decision about a particular course of action; e.g., the direction that those participating will take in terms of developing a new partnership, program strategy, policy, or administrative change; and a case summary of the match itself that summarizes the substance of the match so that it can be shared with all participants and other interested parties.

Case summaries review the context for the match—who is involved, what they hope to learn, how they intend to use the consultation—summarize the main lessons learned and participants' reflections, and identify the next steps and commitments to action that participants make. The summaries are always sent to match participants to review, amend, and approve before they are published and more widely distributed by CSSP and other sponsoring or match participant organizations. The summaries serve as:

- A record of the match;
- A reminder of the options for action considered during the match and the individual and collective commitments for action agreed to;
- A means for sharing the experience with others who need to be involved in implementing proposed solutions;
- A resource for other interested parties (the subject matter of matches is often of interest to other communities working on similar issues); and
- Tangible evidence that those who are called on to be peer consultants are doing highly valued work and help others learn from what they're doing.

Step 6. Checking in with Participants

Immediately following the match, the facilitator contacts participants to discuss individual or collective commitments and/or requests for written materials, advice, or additional information provided during the match. In the matches conducted for *Making Connections*, the facilitator usually communicates closely with the site team about additional investments or follow-up actions that might increase the likelihood that people are successful in taking next steps. The facilitator also circulates a draft of the peer match summary among participants and incorporates any suggestions and changes before making the summary available for circulation among a wider audience. The facilitator then checks back again a few months later with participants to determine the impact the match has had and to discuss any emerging TA needs. As previously noted for the *Making Connections* sites, Community Development Associates also interviews a sample of peer match participants each year.

vignette three

Building Assets in San Antonio's Edgewood Neighborhood: A Peer Match between San Antonio, Texas; Washington, D.C.; and Philadelphia, Pennsylvania

During the fall of 2000, Rebecca Brune, a staff person for San Antonio's ASCEND (Advocates Striving to Create Edgewood Neighborhood Development) and residents were ready to kick off a new Individual Development Account (IDA) program in their neighborhood. IDAs and financial literacy classes help families build savings accounts by providing them with peer support, information about personal finance and money management, and a dollar match of their savings—sometimes as much as four dollars for every dollar saved.

The IDA program, administered by the city of San Antonio, was in the early stage of development, and Rebecca—although bursting with enthusiasm—was feeling a bit overwhelmed and anxious. She and Marylou Mendoza—a neighborhood leader and one of the first IDA participants—were finding their way through a maze of regulations, ideas, and needs in the hopes of crafting the ideal IDA program for women living in their neighborhood. Rebecca wanted to know how other programs recruit participants, work with local financial institutions, and offer classes that meet the needs of the participants. Marylou wanted to meet other women who had faced similar struggles and find out how they had succeeded in their IDA programs and small businesses.

With a bit of research and word of mouth, a couple of promising sites were identified. CFED (the Corporation for Enterprise Development) in Washington D.C. is a highly respected nonprofit organization that has led the nation in fostering IDAs and microenterprise for low-income and distressed communities. A second site, WORC (Women's Opportunity Resource Center) in Philadelphia, is a presidential award-winning program with 15 years experience promoting social and economic self-sufficiency for economically disadvantaged women and their families.

The team from San Antonio visited both CFED and WORC. After two tiring but exciting days, they returned to San Antonio and began to implement their IDA program, using their knowledge and insights.



Numerous ideas—the direct result of their visits—were incorporated. Rebecca talks about how helpful it was to hear what others had already learned and what it takes for real success. "It was especially valuable to gather some strategies about how to develop relationships and partnerships so we can share with others the work and tasks of the IDA program and financial literacy classes. They were also able to provide some ideas for national resources and even some people to talk to in Austin and Dallas, close to home." Rebecca's anxiety, as the staff person responsible for implementation, was considerably reduced because she had confidence gained through new information, and she also had new colleagues and peers to turn to for advice.

Marylou was animated as she processed lots of new experiences. She had never before traveled on either a train or a plane and had never experienced snow. Her colleagues noted that her excitement about these new experiences seemed to mirror her excitement about the new ideas she had gathered during the trip. When describing the visits to Washington D.C. and Philadelphia, Marylou talks about how it has "expanded my sense of what's possible." She too has more confidence, information, peers, and a sense that dreams do come true. Dozens of photographs from the trip line her shelves, and she has repeatedly shown them to her children and friends. Marylou uses these pictures as a way to say to other neighborhood residents and her children, "Look, this is where I've been, and I know anything is possible. You can be in these places too some day because I know now that we can make things happen."

A year after the peer match, the IDA program was off the ground and running well, with 47 participants. While the national average savings rate for IDA participants was about \$25/month, the San Antonio IDA program had an average monthly savings rate of \$46/month. Rebecca and Marylou were continuing to turn to the information they received and the friends they made to help them develop and enhance the IDA program and learn about small business development.



VI. Who are the peer consultants?

The Attributes of Effective Peer Consultants

The primary responsibility of peer consultants is to share relevant information and experiences and to engage in joint problem-solving around a given challenge. While almost everyone working in the field has something to share with colleagues, translating that practical experience in ways that can help others move forward with their own challenges is a highly prized skill set that not everyone has fully developed. CSSP's understanding of the skills, experiences, and dispositions that make people effective peer consultants has evolved over time, and the best advice in this area has come from those who have participated in peer matches. Based on feedback from peer consultants, attributes that help peer consultants be effective include:

- Understanding that the aim of peer consultation is to help colleagues arrive at their own solutions, not to teach them a particular approach or replicate any one model.
- Having substantive, hands-on expertise based on their own work and accomplishments.
- Providing practical advice that addresses the challenges and issues at hand.
- Applying principles learned from their own experiences to the specific circumstances of the TA recipients, e.g., the peers who requested the technical assistance.
- Listening and communicating effectively and posing thought-provoking questions that help TA recipients tease out challenges and understand the resources and relationships they can build on to achieve their desired results.
- Investing the time needed to learn about the politics and environment of the site they are assisting.
- Entering readily into a collegial relationship with TA recipients, with a sense of equality and respect.

“I wasn't sure I was ready for this work. It takes different skills to teach rather than to do—to help someone else solve a problem, rather than just managing that problem, as I do all the time.”

— Dick Matt, Former Deputy Director of Children Services, Missouri Department of Social Services

- Being culturally sensitive and capable of constructively addressing issues of race, class, ethnicity, language, and power that may arise during the process.
- Motivating and inspiring TA recipients, contributing to their excitement about the work ahead and their sense of what is possible.

Peer consultants do not get paid for the substantial investments of time and effort they make to participate in a match. Peer match facilitators say, however, that the issue of monetary compensation rarely surfaces when they ask people to serve as consultants at a match. The reason, says Caroline Gaston, is that peer TA builds on one of the natural assets of the community building and social development fields—a strong commitment to teaching and learning. “People in this business are happy to share what they are doing with others,” Gaston says. “And most people appreciate the fact they will learn something from this too.” Jane Charmoli, a peer consultant for several matches, agrees. “Connecting is important,” she says. “While we are advising, the questions that are asked carry into later conversations; they spark something we have not thought of, another way of doing things, or some type of conversation to look at what we are doing again.”





Match Facilitators Sharpen Their Skills

In addition to training peer consultants, CSSP and its partners also train peer match facilitators. Training is based on a set of core values and principles. Perhaps the most important of these is the facilitator's belief that the collective experience and expertise of peer match participants can be harnessed to develop viable and creative options for action. Effective peer match facilitators also develop skills to help a group achieve the results they are seeking. Working with Sherbrooke Consulting, Casey Family Services, and Casey Family Programs, CSSP has developed materials that help peer match facilitators acquire "results-based" facilitation skills as they learn more about conducting peer matches.

Helping People "Unlock" and Develop Peer Consulting Skills

Obviously, not everyone who acts as a peer consultant has all these attributes in equal measure. Sometimes people use peer consulting skills in their everyday work but haven't had a chance to think about how they might be combined and applied to help colleagues in another neighborhood, city, or state. Some people are extremely talented and effective "doers," but need to take the time to develop and practice a new set of skills in order to be effective consultants. Focusing on the desirable attributes of peer consultants has been helpful in recruiting and communicating to those involved in peer matches what the expectations are and how the experience differs from a conference presentation or workshop, or even a well-planned site visit that is not structured as a peer match.

In addition, these attributes have guided the development of a training experience to help potential peer consultants "unlock" and develop their peer consulting skills. Working with Sherbrooke Consulting (a partner that provides technical assistance on strategic planning, leadership development, and facilitation), other partner organizations that also sponsor peer matches, and a wide range of people who have participated in matches, CSSP periodically offers specialized training to people who are interested in

making themselves available as peer consultants. The training has evolved over time—the first group of potential peer consultants was trained in February 1996—and is grounded in the belief that even the most experienced policymakers, professionals, and neighborhood leaders can sharpen their ability to use what they know in order to help others.

Participants in peer consultant training have found the following types of training experiences particularly useful as they grappled with their new role:

- *Eliciting from participants their own perceptions about helpful and non-helpful consultant behavior, as they have experienced it in their work.*
- *Naming and practicing the skills that lead to effective peer consulting.* Those participating in peer matches have said time and again that two skills are particularly valuable. One is the ability to listen appreciatively to the concerns and ideas of the requesting team. The second is to assist in developing potential avenues for action by using thoughtful questions to help people think through their desired results, the resources they have to work with, and the relationships they can take advantage of or build to be more effective.
- *Using carefully crafted scenarios of real-life situations and challenges to create opportunities for role-playing and using a variety of peer consulting skills in combination.*
- *Incorporating the lessons from successful peer matches through the use of case studies of prior matches, written products from matches, and stories told by experienced peer consultants.*
- *Creating opportunities that help people clarify their own comfort levels in dealing with issues of power and authority and practicing using peer consulting skills to constructively address issues of race, class, and power that often arise in peer matches.*

VII. What are the challenges for sustaining and extending the peer match approach?

CSSP'S WORK TO DEVELOP and provide peer matches is mature enough to permit some conclusions about why and when it is most effective. There is now a solid base of qualitative evidence to show that this particular form of TA really does help people put into place new strategies designed to improve results for families and children. The peer match process is constantly evolving in order to be responsive to the learning needs of those who participate. The trick is to balance efforts to customize the process with a firmly grounded sense of the “non-negotiables” that make peer matches work so well.

Planning and participating in over 70 peer matches over the past few years has not only strengthened CSSP's understanding of how and why peer matches work, but also raised questions to be addressed during the next iteration of this work.

- *Is a formal evaluation of the process necessary to make the case that peer matches get results?* CSSP uses post-match evaluation forms to gather information about the effectiveness of every match (see Appendix). In addition, as part of *Making Connections*, the Casey Foundation funds an ongoing process to learn about the effectiveness of peer matches and other TA. The uniformly positive feedback from consumers indicates that under the right circumstances, peer matches help people take informed action quickly.

The question remains, however, whether the evidence assembled from post-match evaluation forms, debriefing sessions asking participants about the process and its impact, and the observations and interviews done by Community Development Associates needs to be augmented by more rigorous evaluations. One future source of learning is the Casey Family Programs' formal evaluation of how its use of the peer match approach has impacted the *Starting Early, Starting Smart* initiative (jointly funded by Casey Family Programs and the federal government). That study is expected to be completed in 2003 and should provide addi-

tional data about the effectiveness of peer matches, as well as a sense of what kinds of additional or different information can be gained through a more rigorous evaluation of CSSP's peer matches.

- *What might encourage other funders and providers of TA to provide the necessary resources to make peer matches more widely available?* A related challenge is securing adequate funding to meet the demand for peer matches. Peer technical assistance can seem expensive. Costs for matches can vary from \$8,000 to \$25,000 (including the time spent by the match facilitator preparing, conducting, and following up on the match) depending on how many people travel and where the matches occur. However, given the kinds of results that matches produce, this level of investment seems warranted and is often no more expensive than hiring an expert consultant or taking a large group of people on a site visit that lacks the results-focus, the structured learning, or the pay-off of a peer match.

The lessons learned to date go a long way toward establishing the legitimacy of peer consultants—gifted policymakers, practitioners, managers, and neighborhood leaders—as providers of technical assistance. However, the bulk of the systems currently in place for determining who provides TA (e.g., requests for proposals, relationships between funders, intermediary organizations, and professional TA providers) favors “experts” and professionals. Shifting the current balance of who controls technical assistance resources might be one way to address this challenge. An important lesson that has emerged from CSSP's experience working as part of the Casey Foundation's Technical Assistance Resource Center is that providing the recipients of TA a greater say in determining what help they want and how that help is provided leads to a different pattern of TA use than does contracting with one or more organizations to make available a pre-determined menu of TA. The number of requests for peer matches has climbed steadily as people in

the Casey *Making Connections* sites have become aware of the option of learning from their peers.

- *Aside from adequate funding, what else would it take to make peer matches available at something approaching scale?* Because of the level of preparation and the investment of time and human resources required for each match, CSSP has been able to sponsor approximately 20 matches a year. CSSP has also taken time to share the “technology” of peer matches with a limited number of other interested intermediary organizations, funders, and TA providers. Assuming that the evidence about the results of peer matches grows, and more public and private funders become willing to invest TA resources in an approach like peer matches, what else is necessary to dramatically expand the capacity to make these peer-to-peer learning opportunities available? Are peer consultants available (especially those from highly regarded community change initiatives with track records of success) for greatly increased activities? What kinds of investments are needed to increase the pool of talented facilitators to manage the process? How can CSSP and other interested organizations ensure that the integrity of the process is protected and guard against “model drift”, or watering down an effective approach as it is replicated more widely?

What else can be done to support those who are willing to act as peer consultants? As both the scope and scale of CSSP’s work have changed over time, recruiting, orienting, and supporting peer consultants has become trickier. Early on in developing peer matches, it was relatively easy to identify people working in the field on a particular set of community change strategies (e.g., community schools, systems of care for families with children with mental health needs, or developing new forms of community decision making) and to recruit and orient potential peer consultants who would work with one another on these issues. CSSP frequently provided training to “net-

works” of potential peer consultants. There was a promise of a *quid pro quo*—if you agreed to act as a peer consultant, you could safely assume that if you subsequently desired help from peers—a match would be made available.

For the past several years, CSSP has arranged peer matches on such a broad range of topics related to building strong communities and families that it is no longer possible to anticipate in advance who might be called on to act as peer consultants. In this kind of environment, there must be new and additional efforts to communicate to potential peer consultants the essential elements of a peer match and ensure they have the requisite skills and attributes to share their experience in a way that is consistent with the process.

CSSP has also pushed its work much closer to the neighborhood level and more frequently asks neighborhood residents and staff of small grassroots organizations to act as peer consultants and participate in matches. The good news is that people still almost always see the benefit of participating in a match and seldom ask for financial compensation. However, participation places more hardship on some participants than others. Because neighborhood residents are usually not compensated through their employers, CSSP provides them stipends to help defray the cost of the time they invest in matches. CSSP has also begun to provide stipends to organizations with extremely small budgets in recognition of the fact that if their staff is participating in a match, some other important community work is probably going undone. But the larger issue of helping innovative and effective community initiatives develop the capacity to provide technical assistance without undermining their ability to do their own work looms large and requires further thinking by funders and intermediary organizations about appropriate compensation.

How important is it for peer matches to be part of a broader technical assistance strategy? Early

on peer matches were meant to be a catalytic event that helped people frame and respond to a pressing challenge. Available resources were focused on providing and learning about the peer match process, and consequently, there was no guarantee that any kind of follow-up help with the execution of a plan of action would be available. CSSP's recent experience providing peer matches as part of a larger technical assistance effort for the Annie E. Casey Foundation's *Making Connections* initiative suggests that follow-up help is an important way to guarantee the original investment in a peer match. While there are many examples of people participating in peer matches and bringing their work to fruition without further outside help, there are also several cases where additional help or investment enabled people to act more quickly and effectively on the options developed during a peer match. For example, in San Antonio, after expressing an interest in learning more about the Time Dollar program, a team of residents and leaders attended a peer match with a group in Miami. Upon returning to San Antonio, the residents discussed what they had learned, met with other residents from across the targeted neighborhoods, and decided that Time Dollar would help them bring neighbors together for mutual help and networking. With the assistance of several day-long, hands-on trainings facilitated by the Time Dollar Institute, the group made rapid progress designing a program, hiring a staff person, and implementing a program that was custom-designed to its needs. Gaining a better sense of what kinds of circumstances, issues, or desired results might signal a need for follow-up help would assist in determining whether or not to recommend a peer match in cases where additional help is not likely to be available.

The challenge remains to meet the demand for additional opportunities for dedicated and skilled people around the country to learn from each other and expand their sense of what's really possible when it comes to improving results for families and children.



The extent to which CSSP and other partner organizations are able to work with colleagues in the field to answer these questions will influence how widely available peer matches become in the future, as well as when and how peer matches are used as part of broader TA efforts in the community-building world. But even as work proceeds to learn more about peer matches, the challenge remains to meet the demand for additional opportunities for dedicated and skilled people around the country to learn from each other and expand their sense of what's really possible when it comes to improving results for families and children.

Creating A Resident-led Community Development Corporation: San Diego, California; Newark, New Jersey; Boston and Lawrence, Massachusetts

When Gale Walker started the Bronze Triangle Community Development Corporation (CDC) two years ago to promote family-supportive neighborhood development and economic growth in San Diego’s Logan Heights, Grant Hill, and Stockton neighborhoods, she wanted to make sure its mission, values, and goals were shaped and driven by residents.

That meant the fledging CDC would have to be self-reliant—able to spend its time on community organizing and outreach, battling a wave of gentrification, and enlisting corporate and government allies rather than struggling to stay in existence.

That’s why Walker warmed immediately to the idea of a peer match with three established, comprehensive community development organizations in Massachusetts and New Jersey: the Dudley Street Neighborhood Initiative in Boston, Lawrence CommunityWorks in Lawrence, and the New Community Corporation in Newark.

After a pre-match conference call with representatives from each group, Walker said, “the excitement level in me really went up. They [the match organizers] had identified organizations that had done things similar to what we were trying to accomplish—a CDC that was very self-sufficient.”

A former welfare recipient who went on to found Children of the Rainbow, a nationally recognized child-care center that serves more than 200 families in the Bronze Triangle and has annual revenues of more than \$1 million, Walker knows something about self-

sufficiency. And she believes too many community organizations get caught in a cycle of dependency. “I’ve learned a lot about nonprofits moving away from their mission because they were meeting with their funders too frequently,” Walker said. Community organizing, strategic alliances with key stakeholders, and innovative public-private partnerships have helped the Bronze Triangle CDC emerge as one of San Diego’s most visible nonprofit organizations. Walker said the peer match inspired her, as well as the local residents and community leaders who participated in the match, to “think big, work hard, and take our message and mission to the streets and to City Hall.” Above all else, Walker said, the match taught them what was possible.

“It was a total validation that something like this could be done,” she said. Walker and Veronica Garcia, a Bronze Triangle resident who also participated in the match, said the struggles and triumphs of the Dudley Street Neighborhood Initiative (DSNI) resonated with their own challenges and aspirations. Serving Boston’s Roxbury/North Dorchester neighborhoods, DSNI has earned national acclaim for empowering local residents to take back their once-blighted community, turning more than 300 formerly abandoned homes, apartment complexes, and vacant lots into quality affordable housing, parks, and gardens.

“I believe they had it worse than we did,” said Garcia. “They did the homes, the land trust—just taking over their own community. It was mostly residents that worked there . . . and it was empowering us with all this good information about what they did.”



Each of the CDCs in the match emphasized resident mobilization and cultivating grass roots leaders to tap, in Walker's words, "the fire burning in people's souls ...we are not victims. We have to stand strong and say 'This is what we want.'" And the match gave Bronze Triangle leaders practical strategies about how to lift up resident voices and concerns. For example, they learned from DSNI that many residents didn't participate in community planning meetings and events because they never heard about them. One reason why is that meeting notices are often mailed only to landlords in neighborhoods where most folks rent rather than own homes. When Walker did a mailing to 7,000 Bronze Triangle residents about a meeting on the neighborhood's strategic plan, she made sure they were addressed to current residents as well as property owners. More than 500 people turned out.

The peer match also underscored the need to enlist and align government and business leaders to a CDC's vision and goals. "We do not have to be confrontational," Walker said. "We've invited them in, let them tour our neighborhood. We got that from the match." Walker said she learned from DSNI, Lawrence CommunityWorks, and New Community Corporation that engaging core partners as equals helps build capacity and foster true collaboration. "We have a lot of nonprofits that to me are dysfunctional. They say 'because we have this huge crisis, it is okay if we step on toes.'" The Bronze Triangle CDC has instead pitched a big tent. In May, they invited more than 50 key stakeholders to hear details about its neighborhood strategic plan, tour the community, and support its effort to become a pilot site for the city's \$3 billion "City of Villages" urban


revitalization plan. In attendance were two city councilmen, a county supervisor, the city planner, bankers, and real estate developers.

Bronze Triangle CDC organizers also adapted a strategy from Lawrence CommunityWorks to create new affordable housing and increase job skills within the neighborhood by joining forces with Habitat for Humanity, local trade unions, and the city. The partnership has developed a home construction and renovation apprenticeship program that will enlist residents in building new housing on vacant lots and provide financial education on getting low-interest loans and mortgages.

"We have created this energy of sophistication around low-income neighborhoods," Walker said. "We do presentations in front of the San Diego Regional Chamber of Commerce and the Convention and Visitors Bureau so that when we go for the City of Villages [pilot program grant] we can get them to endorse the work we are doing."

The match encouraged Walker and others to think big. "Sure, I could say 'Let me hire a housing developer, let's do little programs.' What we are doing is a huge challenge. But if we do not get in front of revitalizing the community, the CDC will not exist anyway." It hasn't been easy, but having access to good advice from their peers has made all the difference for the Bronze Triangle CDC. "We are learning," she said. "We laugh and say that we are on a crash course, but we do have all the experts at the table teaching us."





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