

# A Financial Analysis of Application Completion in the New Americans Campaign



Submitted to  
**The New Americans Campaign**  
By  
**The Resource for Great Programs, Inc.**  
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# Financial Analysis of Application Completion in the New Americans Campaign

## Executive Summary

### A. Overview

The New Americans Campaign (NAC) is a diverse national network of legal-service organizations, faith-based organizations, businesses, foundations and community leaders that is paving a better road to citizenship.<sup>1</sup>

Between November 2013 and April 2014, The Resource for Great Programs conducted a financial analysis of the first two years of the NAC.

1. The purpose was to provide insights regarding how the NAC can leverage its resources in the next phase to maximize the numbers of lawful permanent residents (LPRs) who can be helped in completing applications for U.S. citizenship. The goal was to produce site-specific, model-specific, partner-specific, and NAC-wide findings and actionable recommendations to drive improvements to maximize effectiveness.

The study, summarized in the text box at right, produced:

- *A picture of the full costs of producing naturalization applications, including both NAC funding and non-NAC resources such as grants, volunteers, and in-kind donations.*
- *Measures of the efficiency achieved by local partners in production of naturalization applications and fee waivers to date.*
- *Information about factors (“challenges”) that drive costs upward.*
- *Measures of the impact of levers (“opportunities”) applied by local partners to increase the numbers of applicants they can serve with limited resources.*
- *An analysis of the ten local partners (“outliers”) that produced applications and fee waivers with the highest efficiency in NAC Year 2.*
- *Recommendations for maximizing efficiency at the local, site, and national levels of the NAC.*

<sup>1</sup> For further information about the New Americans Campaign (NAC), visit <http://newamericanscampaign.org/>.

### The Study at a Glance

**8 Sites** were included in the study:

- Charlotte, NC
- Dallas, TX
- Detroit, MI
- Houston, TX
- Los Angeles, CA
- Miami, FL
- New York, NY
- San Jose, CA

**43 Local Partners**

responded to the web survey and follow-up e-mails. These covered:

- **83** percent of grantees funded in Year 2.
- **93** percent of the naturalization applications completed in that year.

**12-Month Period**

**(July 2012 – June 2013)**

The data covered Year 2, the first 12 months of full operation after initial startup.

**Methodology**

- **Mining** of existing reports and data relevant to cost and output.
- **Interviews** of site and national leaders
- **Web-based survey** of local partners
- **Measure of efficiency** = outputs per \$10K resources deployed
- **Benchmarking of local partners’ efficiency** against medians of 43 programs as a whole
- **Outlier analysis** of top 10-performing local partners
- **Analysis of efficiency** across sites and national partners

## B. Methodology

This study used grant reports and the products of data tracking mechanisms set in place by the Immigrant Legal Resource Center (ILRC), the lead agency for the NAC, as well as information from an evaluation of the NAC conducted by Harder+Company Community Research.

That information was supplemented with a web-based survey and follow-up data collection from local partners that filled gaps in available information – in particular:

- *Non-NAC funding* deployed by the local partners on NAC activities, including non-NAC grants and money from organizations’ general operating funds that local partners use to supplement their NAC grants;
- *Non-funding resources* deployed, including volunteer person-hours and in-kind resources such as donated facilities for events; and
- *Challenges in serving the LPR population*, such as measures of diversity in the primary languages spoken by the applicants who come to naturalization events.

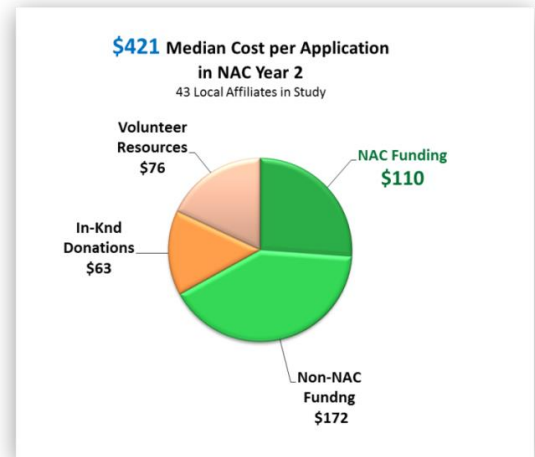
## C. Findings

### 1) Total cost per completed application: \$421

This is the *median* of the total cost per application produced by the local partners in our study.

The exhibit to the right shows how this total is broken out by components, per application:

- \$110 NAC funding
  - \$172 non-NAC funding
  - \$63 in-kind resources
  - \$76 volunteer resources
- } Total funding amounts to a median of **\$282**.



The median output for the partners in the study is **34** applications and **9** fee waivers per \$10K funding.

### 2) Leveraging resources is one of the NAC’s greatest achievements.

An additional **\$2.47** worth of non-NAC resources were deployed by NAC local partners for every dollar in NAC funding received in Year 2, including \$0.78 in volunteer hours, \$0.73 in in-kind resources, and \$0.96 in non-NAC funding.

### 3) Three challenges have an especially significant impact in driving up the cost of applications.

- *Language and cultural diversity* among the LPRs to be served, which requires costly translation and more staffing for naturalization events.
- *Site-specific challenges* that make outreach and service more costly, such as LPR populations spread across vast rural areas, lack of public transportation, and lack of media serving immigrants in their native languages.
- *Lack of volunteer resources or opportunities for garnering in-kind contributions* for naturalization events.

4) **Three levers** are especially significant for driving costs down and maximizing the numbers of LPRs who can be served with a given amount of funding resources.

- **Leveraging volunteers and other in-kind resources.** Non-funding resources – especially volunteers – are keys to the efficient use of group processing. Local partners that deployed large amounts of volunteer resources were able to produce more applications per \$10K of funding.
- **Finding the right mix of group processing and one-on-one approaches.** No single approach to service delivery produced consistently superior efficiency. The key is choosing the strategic mix of models best suited to the specific LPR population and challenges presented by the area being served.
- **Finding the most efficient group processing event size** that works best for the characteristics of the LPR population and site being served. Although the workshop size that yields highest efficiency is still being examined, data indicate that workshops that serve 50-99 applicants are more efficient than smaller events.<sup>2</sup> Further analysis, incorporating a full year of event data, will be necessary to validate this finding.<sup>3</sup>

5) An “outlier analysis” of the 10 most efficient local partners **points the way to higher efficiency.**

A key part of the study was an analysis of “outliers” – the 10 local partners that scored highest on the applications per \$10K funding measure. The analysis reviewed both qualitative evidence and quantitative factors for clues as to possible explanations for the exceptionally high performance of these programs. The text box on Page iv summarizes the findings. The full analysis can be found in Chapter 5 of the report.

<sup>2</sup> Based on a single quarter of data, the median output of programs whose average event serves 50-99 applicants was approximately 100 apps per \$10K funding. Note that the number of applicants who attend a workshop is always higher than the number of applications completed at that workshop.

<sup>3</sup> Data are insufficient at this time with respect to events larger than 99 attendees. Further analysis will include data on these larger workshops as well.

### Assets created by the NAC that promote efficiency

- **An Infrastructure for collaboration** among local providers that historically had been isolated or even in competition.
- **A learning system** run by the ILRC that engages local service providers and national partners in continual efforts to improve efficiency.
- **A leveraging strategy** for deploying a finite amount of NAC funding to attract a critical mass of resources for promoting naturalization of LPRs in large numbers.

### National Drivers of Efficiency within the control of the NAC

- **Adequacy of resources provided to the local affiliates** including the size of NAC sub-grants in relation to the cost of delivering services.
- **Kinds and amounts of support from the national partners**, such as training, technical support, and direct assistance to applicants, provided to the site.
- **Leadership and coordination skills of the site leaders** chosen by the NAC in creating and encouraging teamwork among collaborating service providers.
- **Collaboration by national partners at the site level** that creates synergy by combining the capacities of two or more partners to address the specific challenges presented by a site.

## Findings of the Outlier Analysis

10 local partners that produced the highest numbers of naturalization applications per \$10K of total funding point the way to higher efficiency.

**1. Leveraging volunteers and in-kind resources** is a key to serving more people with available grant dollars.

**6 out of 10** outlier programs **deployed volunteer and/or in-kind resources** at levels above the medians that were seen across the 43 programs in the study.

**2. Use of group processing at optimal size** enables programs to achieve high numbers in situations where this approach is applicable.

**6 out of 10** outlier programs **used group processing** as their primary method of service delivery – that is, they produced 80 percent or more of their applications by this method rather than by one-on-one service.

**3. Low program operating costs are a significant factor** in some outlier programs' achieving high efficiency.... But this finding raises a question about replication and sustainability.

**5 out of 10** outlier programs **had average total estimated program costs below \$41,000** in total funding per full-time equivalent (FTE) staff lawyer (or equivalently paid staff person). This was roughly half of the median value of this measure (\$78,000) across the 43 programs in the study.

**4. Language and cultural diversity** in the population to be served introduces extra costs of translation and outreach making it difficult to achieve high numbers of applications with a given amount of funding.

**Only 2 out of 10** outlier programs **served highly language-diverse populations** – that is, applicant populations in which three or more languages were the primary languages spoken by five percent or more of the applicants served at events.

## D. Recommendations

### Improve efficiency by:

- **Optimizing the delivery approach.** Continue to seek the optimal mix of service delivery methods for achieving the best efficiency.
- **Expanding non-funding resources.** Especially crucial are efforts to strengthen recruitment, training, and support for *volunteers*.
- **Deploying technology.** Streamlining could greatly impact efforts aimed at improving efficiency.
- **Replicating success.** The 10 “outlier” programs can provide relevant best practices for programs working in similar circumstances.
- **Measuring and tracking progress.** Performance-based management at the local level, using the benchmarks developed in this study, could provide ongoing, data-driven feedback to local partners regarding how they are doing on key measures of efficiency.

## E. Conclusion

This study has produced findings and actionable recommendations to drive improvements and maximize effectiveness. We hope that the insights derived from this review of the experience and data produced by the NAC thus far will enable the partners at all levels of the New Americans Campaign to dramatically increase the numbers of lawful permanent residents assisted with completing their application for citizenship in the years ahead.



## Chapter 1: INTRODUCTION

The New Americans Campaign (NAC) is a diverse national network of legal-service organizations, faith-based organizations, businesses, foundations and community leaders that is paving a better road to citizenship.<sup>4</sup>

In 2011 through 2013, the NAC focused its efforts in the eight cities of Charlotte, Dallas, Detroit, Houston, Los Angeles, Miami, New York, and San Jose. More than 3.3 million citizenship-eligible individuals reside in these eight metropolitan areas, representing more than 40 percent of the pool of citizenship-eligible lawful permanent residents (LPRs) in the United States.

Between November 2013 and April 2014, *The Resource for Great Programs* (“The Resource”) conducted a financial analysis of the first two years of the NAC.

The purpose was to provide insights regarding how the NAC can leverage its resources in the next phase to maximize the numbers of lawful permanent residents (LPRs) who can be helped in completing applications for citizenship. The goal was to produce site-specific, service model-specific, partner-specific, and NAC-wide findings and actionable recommendations to drive improvements to maximize effectiveness.

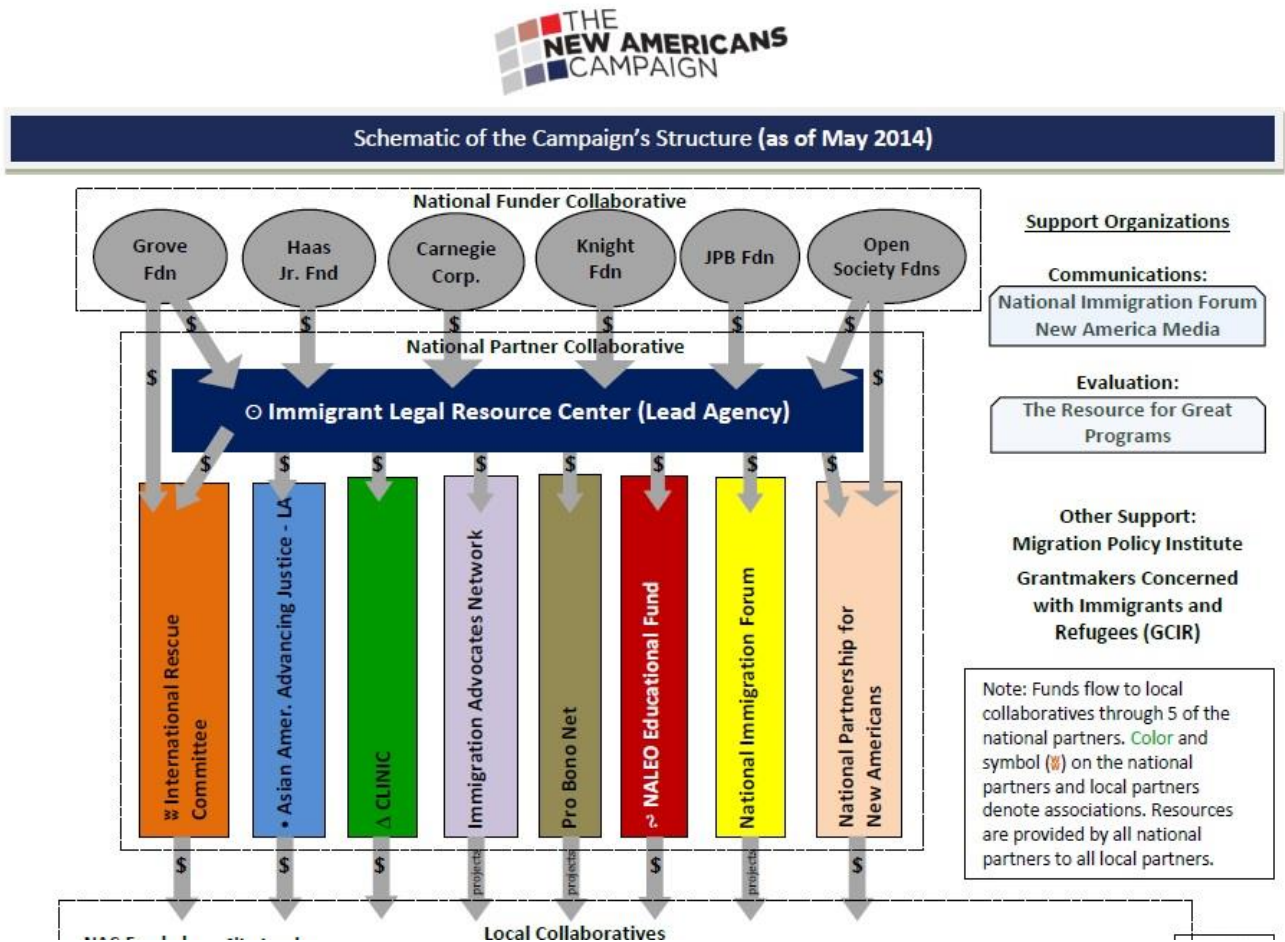
**Exhibit 1.1** on the next page shows schematically the relationships among the *national funders* of the NAC, the *national partners* (including AAAJ, CLINIC, ILRC, IRC, and NALEO, who provide sub-grants to local organizations, and over 50 *local affiliates* (the local partners) in the eight NAC sites.

### This Report at a Glance

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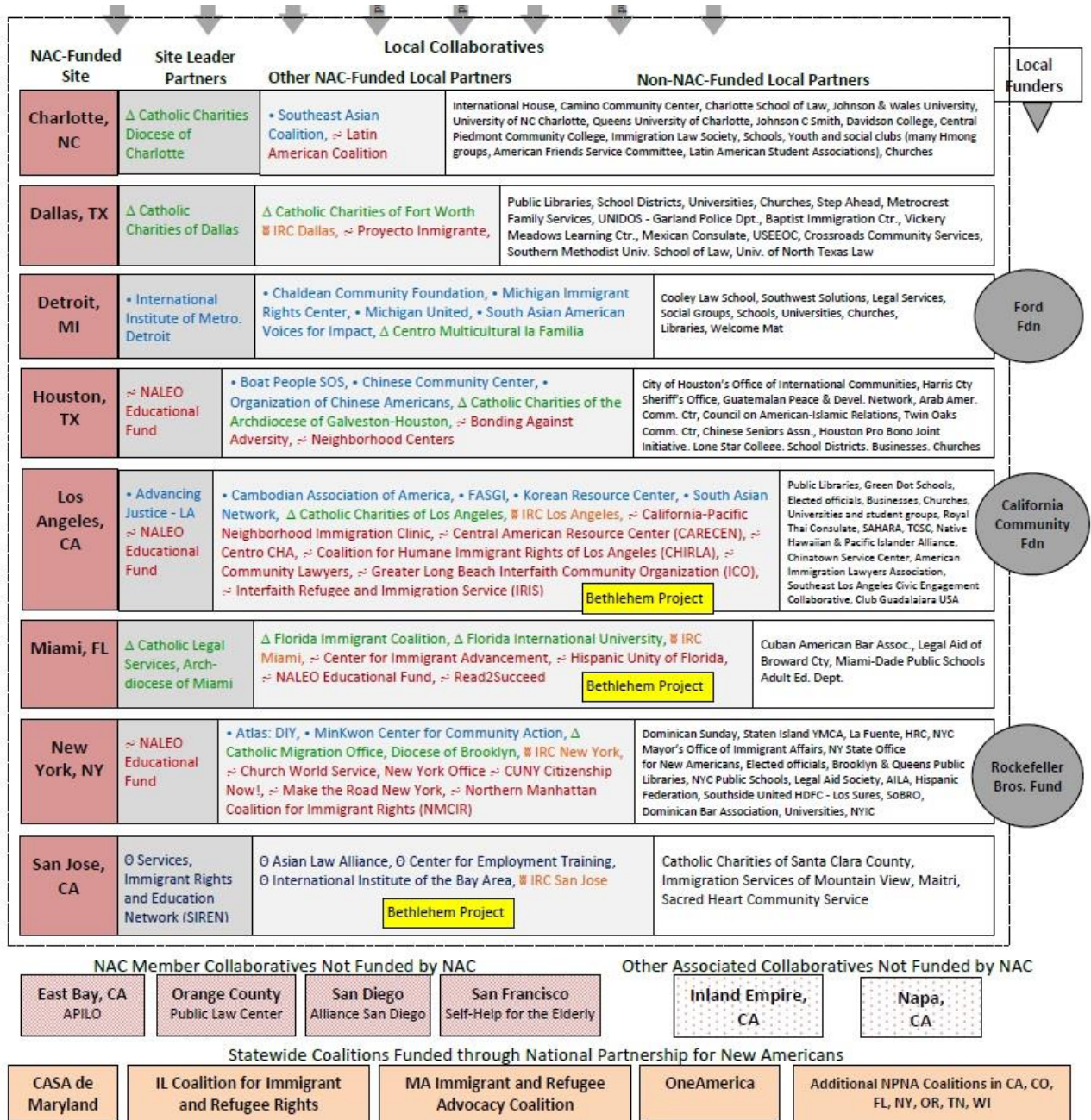
<sup>4</sup> For further information about the New Americans Campaign (NAC), please visit the Campaign on the web at <http://newamericanscampaign.org/>.

## Exhibit 1.1: Schematic of the New Americans Campaign



*Exhibit 1.1 continued on next page...*

## Exhibit 1.1: Continued Schematic of the New Americans Campaign





## Chapter 2: PURPOSE AND SCOPE of the Study

The overall purpose of the financial analysis was to provide insights regarding how the New Americans Campaign can leverage its resources to maximize the numbers of lawful permanent residents (LPRs) who can be helped in completing their application for citizenship. The goal was to produce site-specific, service model-specific, partner-specific, and NAC-wide findings and actionable recommendations to funders for an investment strategy that drives improvements to maximize effectiveness.

**Exhibit 2.1** below indicates the location of the eight original NAC sites.

### Exhibit 2.1: Locations of the Eight Sites in the New Americans Campaign



The eight sites shown in the map and included in this financial analysis were:

1. Charlotte, NC
2. Dallas, TX
3. Detroit, MI
4. Houston, TX
5. Los Angeles, CA
6. Miami, FL
7. New York, NY
8. San Jose, CA

Local partners in these sites were supported collectively by sub-grants from five national partners:

- 1) AAJ (Asian Americans Advancing Justice)
- 2) CLINIC (Catholic Legal Immigration Network, Inc.)
- 3) ILRC (Immigrant Legal Resource Center)
- 4) IRC (International Refugee Committee)
- 5) NALEO (National Association of Latino Elected and Appointed Officials) Educational Fund

The analysis focused on NAC's Year 2 (July 1, 2012 through June 30, 2013), a period that offered the first 12 months of complete data following the organizational and startup phase. An expanded dataset covering the first quarter of Year 3 also was applied as a sample of more detailed data. This quarter of data was collected using an expanded quarterly reporting format introduced by the NAC effective July 1, 2013.

A total of 53 local partners were funded in Year 2. Forty-three local partners responded to our web-based survey and follow-up e-mails exploring details of the responses. The 43 responding organizations represented 81 percent of the funded local partners and accounted for 93 percent of the naturalization applications completed in Year 2.

## Chapter 3: METHODOLOGY

### a. Flow Diagram – the Logic of the Analysis

**Exhibit 3.1** on the next page shows schematically how the grant funding deployed in the New Americans Campaign flows down through the national partners to the collaborating organizations in the eight NAC sites and fuels their activities to produce completed naturalization applications and other outcomes. This flow diagram schematically illustrates the logic being used in this financial analysis.

Reading from top to bottom, the diagram groups the participating organizations in the NAC into the following three levels:

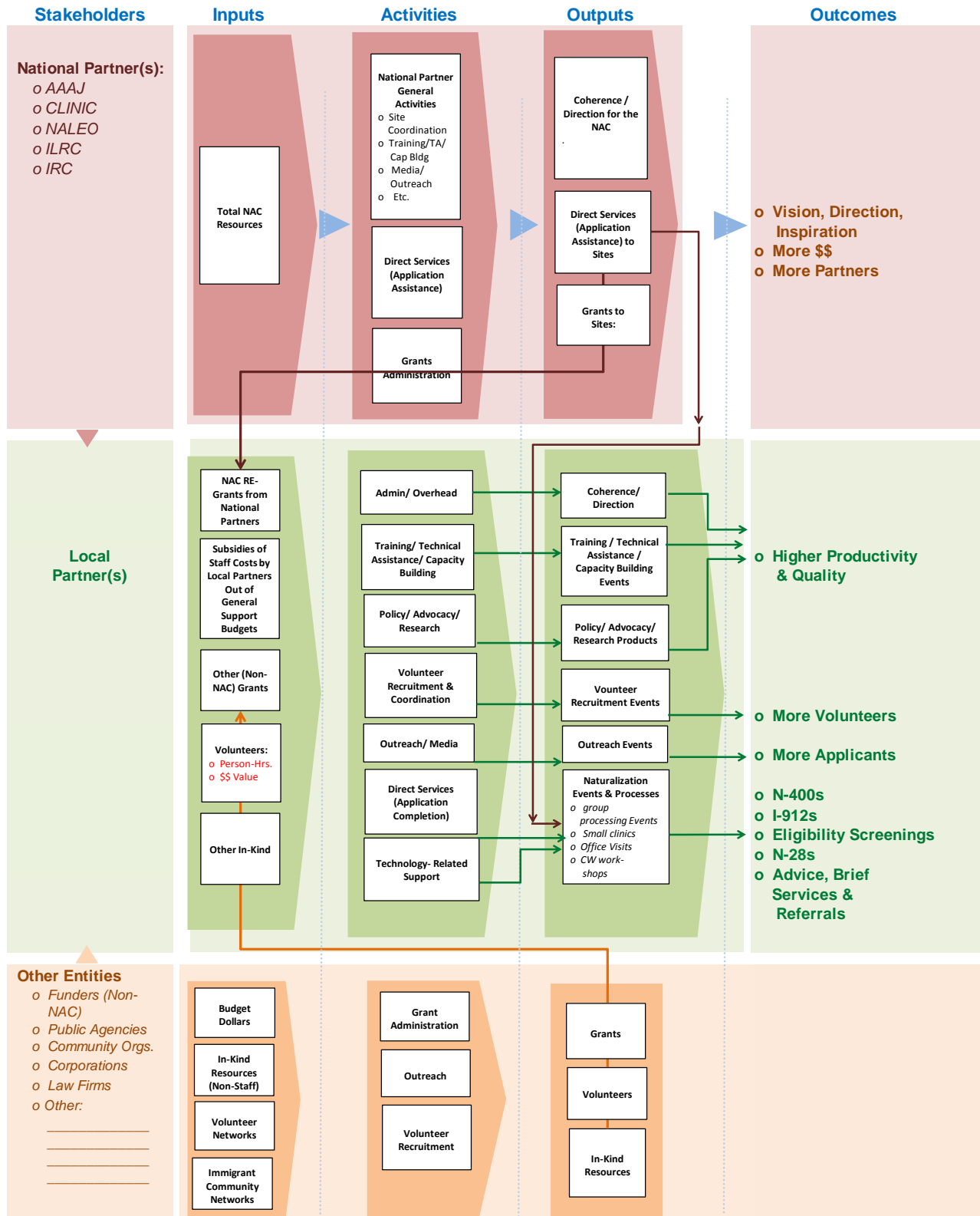
- **National partners** – AAAJ, CLINIC, ILRC, IRC, and NALEO.
- **Local partners (each with a site leader)** in the eight cities – for example, in the Charlotte site, the site leader is the CLINIC affiliate Catholic Charities, Diocese of Charlotte (CCDOC) and the two other local partners are affiliated with AAAJ and NALEO:
  - Southeast Asian Coalition – SEAC (a local partner of AAAJ)
  - 
  - Latin American Coalition (a local partner of NALEO)
- **Other (Non-NAC-funded) entities** – for example, faith-based organizations that provide in-kind resources or volunteers for the campaign

Within each of the above-described three layers, the flow diagram tracks resources through the following clusters (left to right):

- **Inputs** – At the national partner level, these consist of the NAC grants coming through ILRC from the ultimate funders, Carnegie, Knight, etc. At the site/local partner level, inputs consist of NAC grants, other (non-NAC) grants, volunteers, and in-kind resources.

### Exhibit 3.1:

### Flow Diagram: New Americans Campaign, FY 2012-2013





- **Activities** – The inputs depicted in the second column of the diagram are deployed across activities of the NAC participants, such as administration and management, training/technical assistance/capacity building, and direct services (application assistance).
- **Outputs** – The activities carried out by the NAC participants produce results including training events, outreach events, and direct-service events, such as group-processing events, CitizenshipWorks (CW) workshops, and office visits.
- **Outcomes** – The outputs of NAC participants’ activities have outcomes that include more volunteers for the campaign, more LPR applicants for events, and – most importantly – completed naturalization applications, the ultimate outcome at which much of the campaign’s efforts are directed.

## **b. Application of Pre-existing Data**

To minimize cost of data collection, as well as the burden imposed by this project on NAC site staff, this study mined as much of the required data as possible out of reports and other data sources that already existed based on operation of NAC sites in Year 2. The following data were provided to The Resource by ILRC, reflecting the data-tracking mechanisms set in place during the first two and a half years of the NAC campaign:

- **Grant reports submitted to ILRC** by NAC national partners in Years 1 and 2 (and in the first quarter of Year 3, using an updated reporting form).
- **A Master Dataset in Excel** that ILRC has compiled, containing in one place a wide array of relevant data that have been reported by the national partners, site leaders, local partners (affiliates of the national partners), and other sources.
- **A cost analysis workbook in Excel** containing the results of a preliminary analysis by ILRC in August 2013, from the cost and output data submitted by sites and local partners for Years 1, 2, and 3.
- **A Harder+Company Community Research<sup>5</sup> dataset** made available to The Resource, containing data from interviews and surveys conducted by Harder for their evaluation of the NAC.

## **c. Supplemental Data Collected for the Financial Analysis**

Our review of the existing data, carried out in the startup phase of this project, indicated that comprehensive documentation was available for the NAC funding deployed in the campaign and the outcomes of the campaign in terms of total numbers of applicants served, numbers of naturalization applications (N-400s and derivatives) and I-912 fee waivers produced, and other results of the campaign. The following were missing:

- **Non-NAC resources.** The reporting system that was in place during most of the time covered by the analysis did not collect data for quantifying *non-NAC* resources that were deployed, such as general operating funds that local partners

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<sup>5</sup> Harder + Company Community Research is an independent community research firm commissioned to perform an evaluation of the NAC. See <http://harderco.com/>.

use to supplement their NAC grants. Other non-NAC resources that are not captured, but which clearly have a large impact on service providers' ability to produce completed naturalization applications, included access to pools of volunteers and availability of in-kind resources, such as donated media coverage, space for events, and food and other supplies.

- **Data collected at the “event” level of aggregation.** Prior to the onset of Year 3, local partners were required to report each quarter only on total outputs produced (naturalization applications and I-912 fee waivers) and the numbers of naturalization events held, but not on inputs and outputs of each event. Beginning in July 2013, the reporting format was revised to include event-level reporting. The partners began to report on each event held, including such variables as the number of applicants who showed up for service, the numbers of naturalization applications and I-912 fee waivers produced, the numbers of volunteers who assisted, and other factors. For this financial analysis, only the first quarter's worth of event-level data was available. This limited our ability to explore at an event level the impact of variables such as the correlation of group processing event size on cost of producing applications.

**Additional Data Collected for the Study.** To fill the gaps described above, we consulted and engaged site leaders in each of the eight NAC sites through telephone interviews and follow-up e-mails to conduct a web-based survey of local partners.

The survey questions developed in consultation with the site leaders are summarized in Appendix A. The survey was designed to collect comparable data from all eight sites regarding the amount of resources being deployed in addition to NAC funding, such as general operating funds, non-NAC grants, volunteer person-hours, and in-kind resources – including donated media time that was received by NAC partners and deployed in the campaign.

The survey also collected data on how the resources deployed in the campaign were allocated across the broad areas of activity shown in the flow diagram (Exhibit 3.1), such as administration and management, outreach, volunteer recruitment and support, and direct services (application assistance).

#### **d. Measures of Performance**

Seven measures in all were used in assessing the financial performance of local partners in the study. The first two measures were derived by dividing resources by outputs:

1. *Total COST per naturalization application* produced – a measure that included in the numerator all funding, volunteer, and in-kind resources.
2. *Total FUNDING per naturalization application* produced – a measure similar to the above but excluding resources that were free or low-cost – that is, volunteer and in-kind resources, and counted only “hard dollars” deployed by NAC partners in producing applications and fee waivers.

The third and fourth measures flip the relationship, dividing outputs by the resources required to produce them:

3. *Total output of naturalization applications per \$10,000 of funding* (shortened to “Apps per \$10K funding).
4. *Total output of I-912 fee waivers produced per \$10,000 of funding* (shortened to “Fee waivers per \$10K funding”).

The primary measure we used to assess the financial performance of local partners, sites, and national partners was “3”– the *naturalization applications per \$10,000 of total funding* (with “funding” defined as the sum of NAC funding, non-NAC grants, and general operating funds deployed by local partners on NAC activities). By that measure, a “highly efficient” provider is one that produces a significantly higher number of applications than its peers with each \$10,000 in resources it has at its disposal.<sup>6</sup>

Three additional measures were used for assessing the effectiveness of local partners, sites, and national partners at *leveraging* their resources:

5. *The donated resources ratio* – the dollars in volunteer and in-kind resources per dollar of total funding (including NAC- and non-NAC) deployed by the organization;
6. *The funding ratio* – the dollars of non-NAC funding per dollar of NAC funding deployed by the organization; and
7. *The total non-NAC resources ratio* – the dollars in total non-NAC resources (including both funding and donated resources) per dollar of NAC funding deployed by the organization.

Measure “5” is of interest to funders and NAC partners alike. For funders, it indicates the effectiveness of grantees in leveraging hard-dollar funding with volunteer and in-kind resources to produce higher numbers of applications and fee waivers than they otherwise could. For NAC partners, a higher “score” on the measure translates into greater capacity to serve clients and a larger impact on the community.

Measures “6” and “7” are of special interest to the NAC and its national funders. It indicates the effectiveness with which the NAC is leveraging its finite dollars to attract non-NAC dollars (measure “6”) and total non-NAC resources (measure “7”) through the collaborative strategy being deployed in the campaign.

## **e. Analytical Methodology for Identifying High-Performing Programs: A Benchmarking Approach**

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<sup>6</sup> As “outputs,” we believe weight should be given to both naturalization applications and requests for fee waiver. Although the goal of the NAC is to increase the production of applications, it is widely recognized that fee waivers also are important outputs. By helping applicants to assess eligibility and apply for a waiver of the \$680 application filing, NAC local partners remove a significant barrier to citizenship, especially for low-income immigrants who comprise 50 percent or more of the target population of many of the NAC local partners.

That said, the production of fee waivers consumes resources that otherwise could be applied to production of applications. To respond to the primary goal of the NAC in maximizing efficiency in production of naturalization applications, we based our efficiency analysis primarily on measure “3” above.

We applied the above measures of output per \$10K funding to compute benchmarks for comparing sites, such as the median value of a measure across all local partners in the study and the median among the local partners that face a specific challenge, such as high language diversity among the applicant populations being served.

By applying the benchmarks, we were able to identify “outlier” service providers – those local partners whose performance on a measure of efficiency appeared significantly higher than the benchmarks. We then looked more closely at possible explanations for the high or low performance, applying both quantitative and qualitative information about the providers’ efforts assembled from our mining of available materials, such as the Harder+Company interview notes and local partner survey responses.

## **f. Limitations**

The financial analysis encountered two limitations, each the subject of specific recommendations we are making to expand NAC’s capacity for assessing and improving efficiency in the future:

- **Variability in the data due to the use of estimates (rather than contemporaneous tracking) for quantifying non-NAC resources deployed in the NAC.** As indicated above, local partners are *not* required to report non-NAC resources being deployed for NAC activities – only their expenditures from NAC funds. Accordingly, most organizations did not track these resources contemporaneously. The web survey used to estimate non-NAC resources for the study called for local partners to look back at their records and supply best estimates of these resources that were deployed during Year 2. Although we devoted substantial time to follow-up with the local providers to resolve questions that arose from our data quality testing, some of the variation in the final measures we saw from organization to organization undoubtedly arose from uncertainty regarding the actual amounts of resources deployed.
- **Sampling error in measures used to explore opportunities for increasing efficiency.** Our exploration of factors such as size of group processing events and efficiencies derived from the use of CitizenshipWorks was constrained by the small size of the sample – drawn from the limited period during which data were reported at the “event” level starting in the first quarter of Year 3 – used to extrapolate the values of variables that potentially could have explained the high variation in measures of efficiency in Year 2. In addition, the event-level tracking instituted at the beginning of Year 3 was limited in scope, especially with regard to quantifying resources (person-hours of staff and volunteers; value of in-kind resources, etc.) that were deployed at specific events.



## Chapter 4

### A National Perspective: *Findings Regarding Performance of the NAC as a Whole*

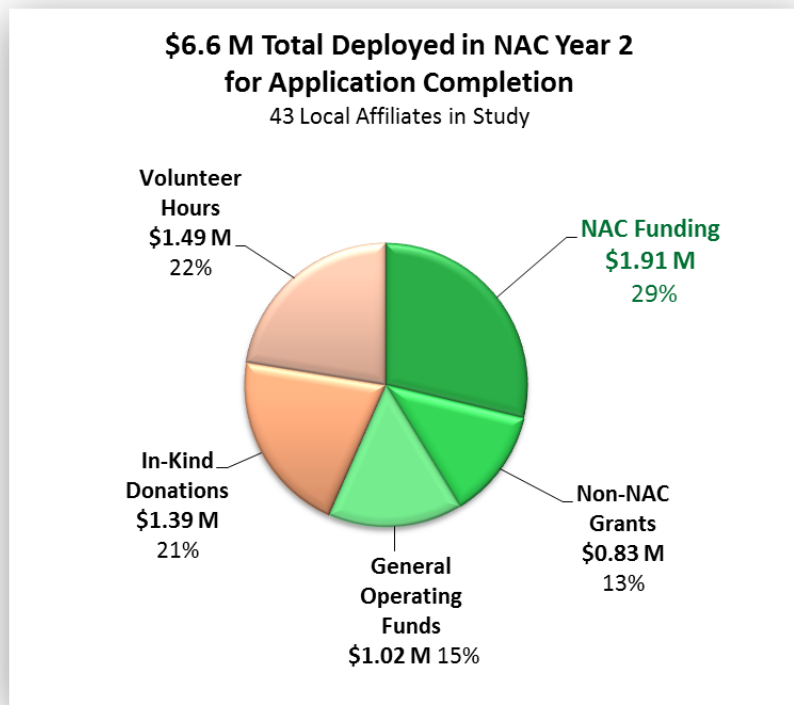
This section summarizes the findings of the study in the following three areas:

- **Resources** – The resources deployed by the campaign for direct production of applications, including NAC funding, other funding, and non-funding resources such as volunteers and in-kind donations.
- **Costs** – The expense of resources required to produce applications, including all the resources listed above.
- **Output** – The numbers of applications and fee waivers that were produced per \$10,000 in funding that was deployed.

#### 1. **Resources Deployed for Direct Services: \$6.6 Million<sup>7</sup>**

**Exhibit 4.1** below summarizes the total amounts of resources deployed by the 43 local partners included in application completion in Year 2 of the NAC.

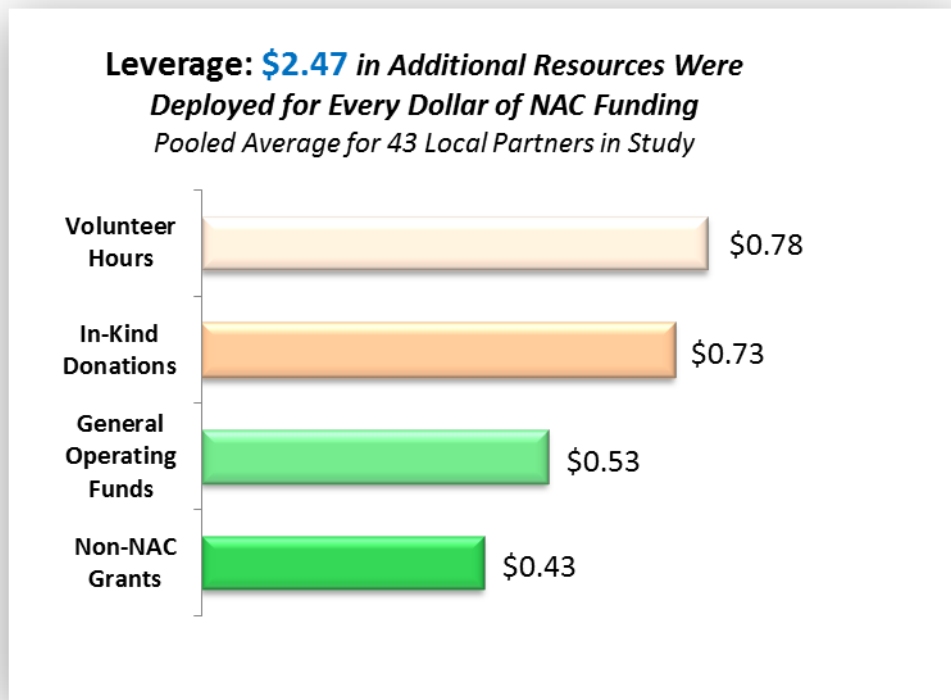
**Exhibit 4.1:**



<sup>7</sup> The \$6.6 million total consists of resources for direct services only; it does not include national partner expenditures on NAC-wide activities such as advocacy, technology, communications, operations, and training.

**Leveraging resources is one of the NAC’s greatest achievements.** As indicated in Exhibit 4.1, NAC funding at \$1.9 million comprises less than one-third (29 percent) of total resources used directly for production of applications. As indicated in **Exhibit 4.2** below, an additional **\$2.47** worth of non-NAC resources were deployed by NAC local partners for every dollar in NAC funding received in Year 2.

**Exhibit 4.2:**



**The leveraging of non-NAC resources was not accidental.** Indeed, it is a key to the NAC design wherein resources are invested at the national level to grow a network of partners rooted in local immigrant communities. In the process, the NAC is serving as a catalyst to attract many times more financial resources (funding, staff, and volunteers) than would otherwise be available for legal assistance for LPRs confronted with the significant hurdles of naturalization.

The following types of resources are especially significant as benefits of leverage:

- **Volunteer resources** – primarily the value of the person-hours contributed by volunteers helping at naturalization events.
- **In-kind donations** – for example, space for events and donated media advertisements.
- **General operating funds** – contributions by local partners made by covering staff and overhead costs in addition to what is charged to their NAC grants.

- **Contributions by staff of local partner organizations**, many of whom work long hours at low pay to stretch the numbers of immigrants who can receive legal assistance with the finite funding available to their programs.<sup>8</sup>
- **Non-NAC grants** – funding received by the local partners and applied to NAC activities.

The results achieved by this work are extraordinary, measured not only by the amount of leverage it produces but also by the collaboration it has activated among naturalization service providers who prior to the NAC have operated in isolation within a region – or worse, competed with each other for a shrinking pool of funding, volunteers, and other resources.

This impact of the national-level work of the NAC is a major theme we found throughout the extensive narrative information contained in the reports produced by the national and local partners and from the interviews carried out by Harder+Company in connection with its evaluation of the NAC.

**a. Total cost = \$421 per application**

This is the *median* of the cost per application produced by each of the 43 local partners whose data were included in our study.<sup>9</sup>

**Exhibit 4.3** on the next page shows how this total is broken out by components, per application. These consist of:

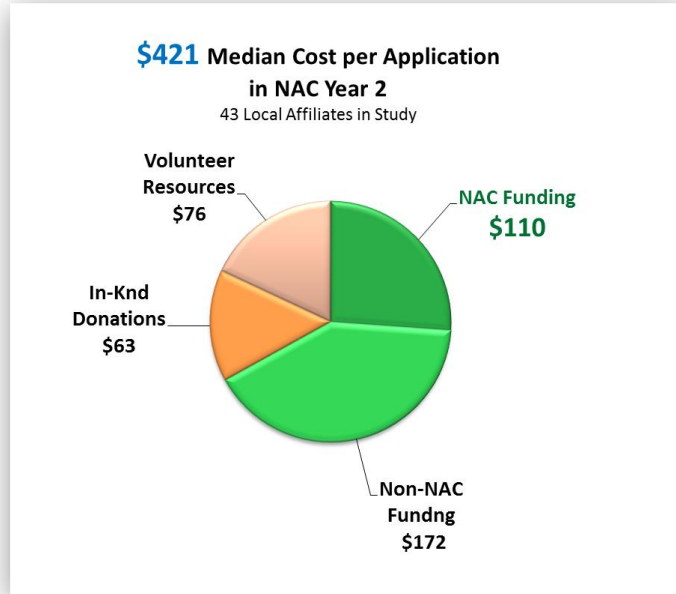
- **\$110 NAC** funding
- **\$172 non-NAC** funding
- **\$63 in-kind** resources
- **\$76 volunteer** resources

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<sup>8</sup> We were unable to precisely quantify this factor, but observed from the data that for some NAC projects the amount of funding being deployed was extremely low in relation to the amount of staff resources (in full-time-equivalents) that were reported. We believe that the willingness of staff to work long hours at low pay represents a contribution that is widely acknowledged but not often captured in program recordkeeping or reporting. In Chapter 5, we raise a caution about the potential negative impacts of this factor on efficiency over the long run in terms of staff productivity, morale, and turnover.

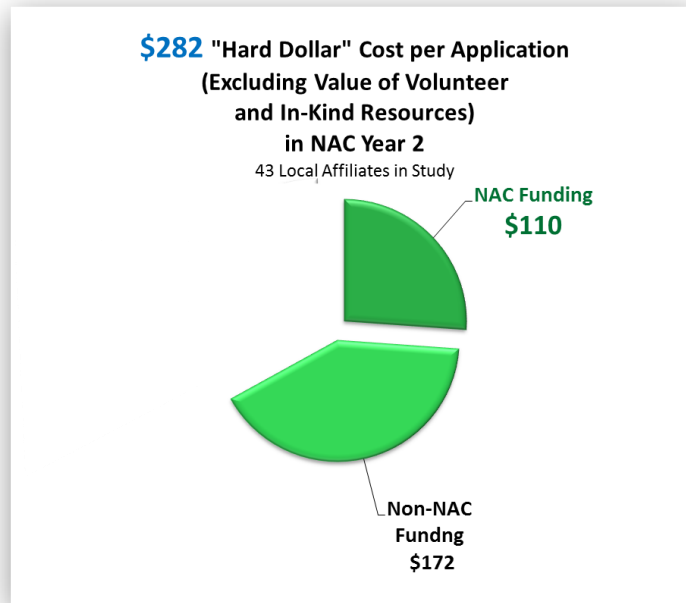
<sup>9</sup> Medians rather than averages were used as benchmarks to define “typical” values of measures used in the study. In situations involving skewed distributions – for example, home prices or workers’ wages – “average” (that is, the arithmetic mean) can be a misleading measure, because the mean gives undue weight to outliers – e.g., million-dollar homes in a town comprised mostly of middle class homes. “Median” is a better measure for characterizing the typical value that a potential buyer could expect to find in that market.

**Exhibit 4.3:**



**Exhibit 4.4** below indicates that the “hard dollar” funding (that is, costs excluding volunteer and in-kind resources) amounts to a median of **\$282** per completed application.

**Exhibit 4.4:**

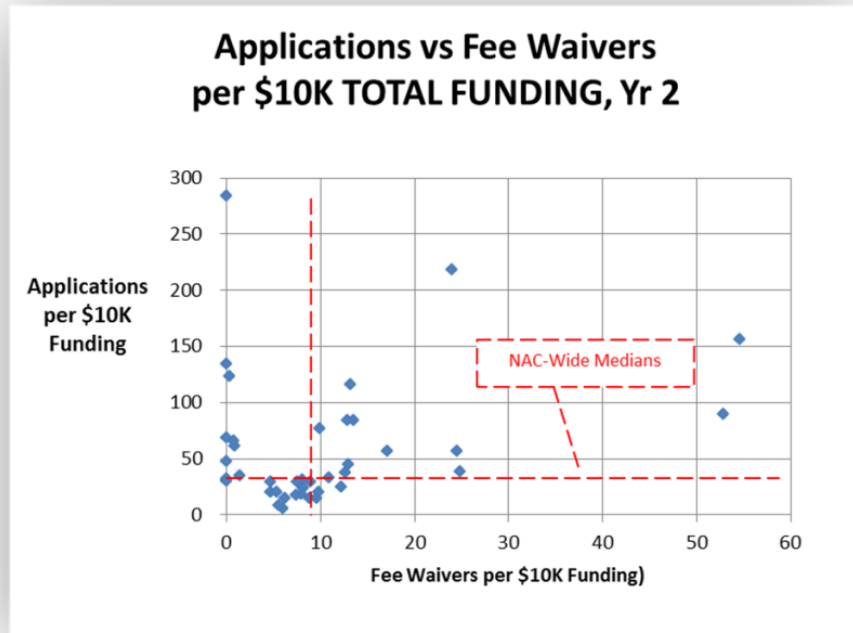




**b. Total Outputs = 34 Applications and 9 Fee Waivers for Every \$10,000 in Funding Resources Deployed**

Exhibit 4.5 below shows the outputs of naturalization applications and I-912 fee waivers produced by the 43 individual local partners that provided data for the study in Year 2.

**Exhibit 4.5:**



Each point represents the outputs of one local partner.

- The *vertical* axis shows the output of applications (“apps”) per \$10K of funding deployed by the provider.
- The *horizontal* axis shows the output of fee waivers per \$10K of funding.
- “Funding” includes: (a) NAC funding, (b) Non-NAC grants used for NAC activities, and (c) funding used for NAC activities that were funded out of local partners’ general operating funds.
- The red dotted lines represent the median outputs of the (43) organizations: **34** applications (horizontal dotted line) and **9** fee waivers (vertical dotted line) per \$10K of funding.

**Four observations can be made about this graph:**

- 1) *Some 85 percent of the local partners produce BOTH applications and fee waivers, in different combinations of the two outputs. Both outputs are important to local partners, so Exhibit 4.5 has included both of them in displaying output in relation to funding.*
- 2) *There was wide variation in application output among local partners. The*

organizations ranged from a low of five to a high of 284 apps per \$10K, a figure that was eight times the median.

- 3) *There was a variety of reasons for this variation.* As discussed in the next chapter, the local partners faced a wide variety of challenges, and their responses present opportunities for insights that potentially will lead to further improvements in efficiency going forward.

## Chapter 5: Assessing Financial Performance at the *LOCAL PARTNER* Level

### a. Overview

A principal goal of this financial analysis was to identify factors that serve as drivers of, or barriers to, efficiency of NAC local partners in producing naturalization applications. This section describes the factors that were identified in our study and our findings regarding their impact on efficiency.

First, we describe the measures we used for assessing “efficiency” in this context. Next, we explore the impacts of several factors we were able to quantify using available data – either from the reports submitted by NAC partners or from our Internet survey of local partners. These were factors that, according to the qualitative information we reviewed in the early phases of this study, are generally believed to have significant impacts on efficiency. Some of these are givens, such as the language diversity of the immigrant population being served; others are levers that NAC partners potentially can wield, such as the choice of group processing versus one-on-one service.

Finally, we look more closely at 10 “outlier” NAC local partners whose performance on our efficiency measures we found to be significantly above the median for the NAC partners as a whole. This analysis produced additional insights regarding factors that appear to enable some partners to perform much better than their peers who operate in similar contexts. We summarize these in the concluding section of this chapter.

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**b. Factors that Affect Financial Performance of Local Partners: *Not a Level Playing Field for NAC Local Partners***

Our review of narrative information from reports and interviews produced consistent themes regarding contextual factors that affect efficiency. These include both barriers (“challenges”) and factors that promote efficiency (“levers”).

**1) Challenges:**

- **Cultural or demographic challenges** – These consist of characteristics of the applicant population being served that affect cost of service, such as high language diversity, low reading literacy, or low computer literacy, any of which can mean that fewer apps and/or fee waivers can be produced per \$10K funding than in a context where these factors are not present, other variables being equal.
- **Outreach challenges** – Characteristics of the service area, such as the lack of non-English language media or lack of public transportation resources, can make outreach to the target population more difficult and expensive, thereby requiring higher investments in resources such as staff time in outreach and driving down the numbers of apps and fee waivers that can be produced per \$10K funding.
- **Lack of volunteer resources or opportunities for garnering in-kind contributions**, such as space for events, requiring that more grant resources must be deployed to achieve a given level of output compared with another NAC local partner that has ready access to these kinds of free or low-cost resources.

**2) Levers:**

- **Efficient processes** – Deploying assets such as technology, group processing methods, well-organized and effective staff work, well-trained volunteers, and processes that produce well-prepared applicants (e.g., requiring up-front preparation prior to receiving services). These enable the provider to serve high numbers of applicants with a given amount of resources.
- **Subsidies to grant funding** – Applying internal program resources that are not “counted” in the efficiency measure, such as resources (staffing and/or administrative overhead) paid for out of the provider’s general operating budget, and transferring costs to their own organizations by having staff participate in weekend or evening workshops that contribute to the output of apps and/or fee waivers without a drain on project funding resources.
- **Non-NAC resources** - Investing grant funds in resource development efforts aimed at attracting non-NAC grants or free- or low-cost resources such as volunteers or donated facilities for events, thereby stretching the finite funding resources (both NAC and non-NAC) that are available.
- **Shifts in costs** – Transferring costs to applicants, by charging a fee-for-service.

### c. Findings Regarding Factors that Affect Efficiency

In the context of the NAC, the efficiency measures have allowed us to sort our sample of NAC local partners in different ways, thereby placing the spotlight on different issues for purposes of generating insights that will help all stakeholders to maximize the numbers of people who can be helped with the limited resources available.

#### 1) Language Diversity and Cultural/Demographic Challenges

There is a great deal of anecdotal evidence in the reports, interviews, and other qualitative information we have reviewed for this analysis suggesting that characteristics of immigrant communities such as language diversity, educational level, reading and writing literacy, and cultural isolation make some target populations more costly to serve than others. We were urged by some of the people we interviewed to include questions in our Internet survey of local partners that could at least flag, if not measure precisely, some of these challenges so they could be taken into account in our analysis of efficiency.

Accordingly, our survey included the following two questions:

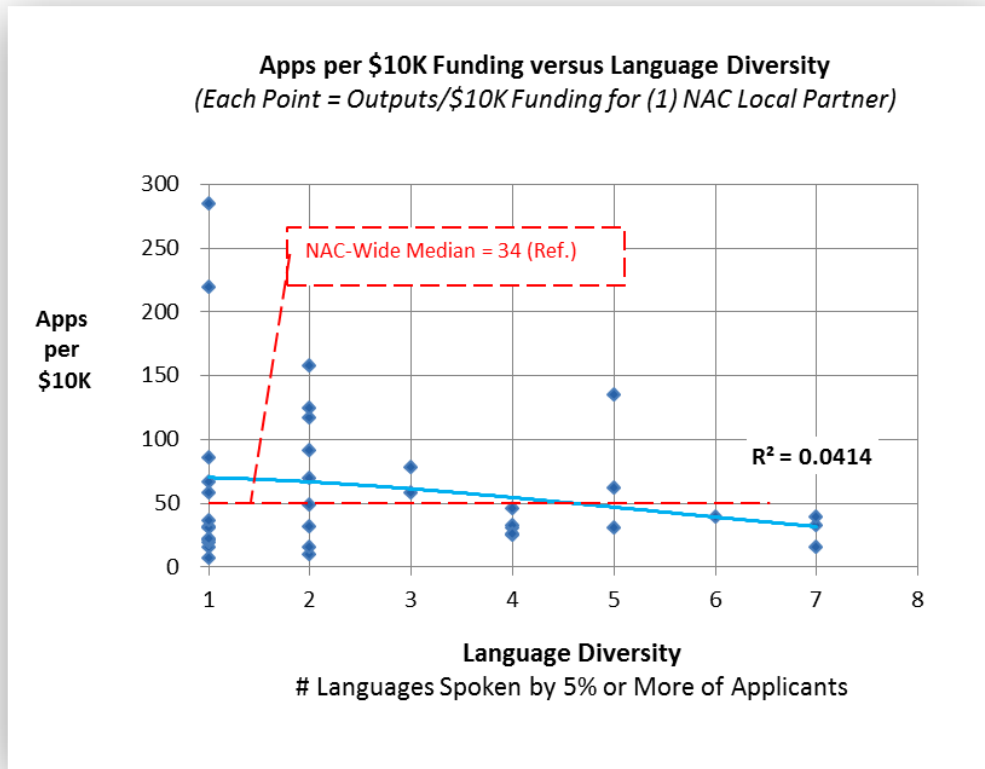
- **Language Diversity** - *Please indicate the major language groups represented among applicants served by your NAC project.*
- **Percentage of total applicants** *served by your NAC project whose primary language is that indicated in the question [above].*

**Exhibit 5.1** on the next page summarizes the analysis of NAC programs' responses to the language diversity question in the context of their performance on the applications per \$10K funding measure. As indicated, partners serving populations with LOW language diversity (defined as two or fewer languages other than English spoken by five percent or more of the target population) tended to produce more applications per \$10K funding than the local partners that served populations of HIGH language diversity (that is, three or more non-English languages spoken by five percent or more of the target population).<sup>10</sup>

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<sup>10</sup> The impact of the language diversity factor is apparent from the declining slope of the blue line indicating the best-fit trend line for the data in Exhibit 5.1.

Exhibit 5.1:



While the statistical support for the negative impact of language diversity (and by implication, other cultural and demographic barriers) is not overwhelming, it aligns with what people observe and report about the higher costs of serving applicants – namely, the fact that extra resources must be applied in order to overcome language barriers and give high quality legal advice.<sup>11</sup>

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<sup>11</sup> As Exhibit 5.1 indicates there was a great deal of variation in performance on the “apps per \$10K funding” measure, especially at the low-language-diversity end of the scale. This was most apparent at diversity levels of 1 or 2, but it also was indicated by the single outlier partner at diversity = 5 that achieved 134 apps per \$10K. The variation that is seen in this chart provides one more example of the general finding that efficiency is affected by many factors in combination; it is not simply a function of one or two variables such as event group size.

## 2) Use of Group Processing versus One-on-One Service

Our capacity to assess the impact of using group processing versus one-on-one service was constrained by limitations in the data that were available – primarily, the lack of cost data linked to the mode of service delivery used. Definitive answers regarding the efficiency of one mode versus another and the circumstances under which each mode is most efficient will have to wait until data are available that link the outputs with the resources that are deployed under each delivery mode at the individual event level.

As we will see from the analysis of outliers later in this chapter, individual NAC local partners are achieving high levels of efficiency using both methods, often in a strategic mix that matches the delivery mode to specific circumstances.

For example, many programs are using a hybrid of the two modes wherein applicants with complex situations flagged at a group processing event are provided with individual, one-on-one service in collaborating partners' offices in the days following the event.

In another example, a particular mode might be most efficient for serving a client population having great language diversity while another might be most efficient in communities where the vast majority speaks a single language and the need for translation services is relatively simple.

## 3) Impact of Size of Group Processing Events

One question about which there is great interest among NAC partners is the size of events that offers the greatest efficiency of naturalization application output. We define event size by the average number of applicants who appear for service. Note that the number served at an event is always higher than the number of applications that are completed.

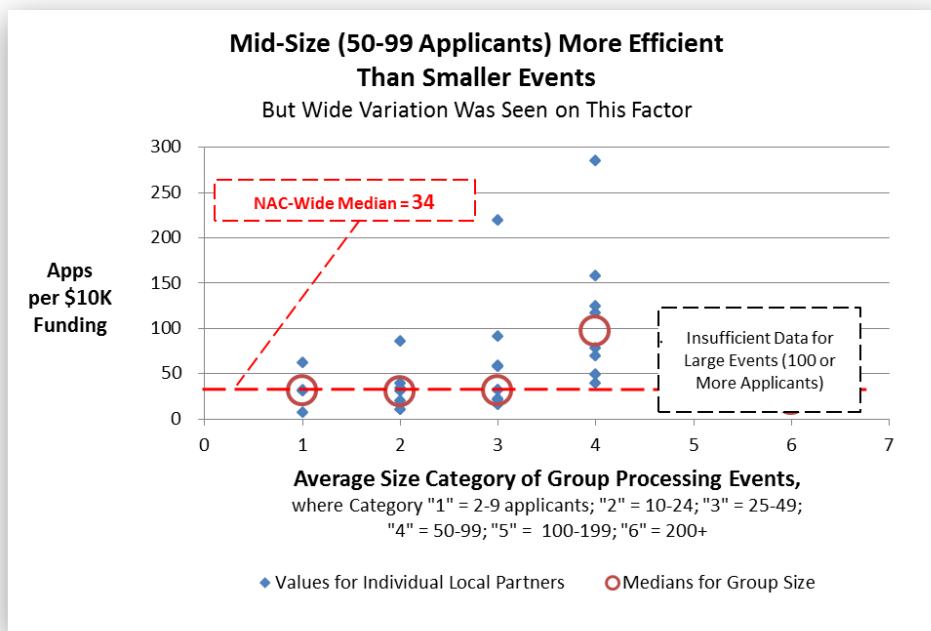
**Exhibit 5.2** on the next page summarizes preliminary findings on the efficiency of apps production by programs that used group processing as a function of the average size of their events.<sup>12</sup>

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<sup>12</sup> Findings are preliminary because they are based on only a single quarter of data, which may not represent the true distributions of events, by size, over the course of a year. The average group size was computed from the “Events” data reported by local partners in the first quarter of Year 3 of the NAC (July 1 through September 30, 2013), when a new reporting format that included reporting on individual group processing events was implemented by the NAC. Further analysis based on a full year of event data may confirm or modify these findings.



## Exhibit 5.2: Impact of Group Processing Event Size



Each small blue point in the graph represents one NAC local partner, and displays its average output of apps per \$10K funding in Year 2 on the vertical axis. The programs are clustered by the average size of their events, displayed on the horizontal axis of the graph. Median values within the size categories are displayed as open circles.<sup>13</sup>

Our observations from these data are as follows:

- **There was a positive correlation between efficiency and group size.** The preliminary finding was that programs whose average size workshops serve 50-99 applicants are more efficient than those whose average size events serve 10-49 people or 2-9 people. Based on a single quarter of event data, the median output of programs serving an average of 50-99 applicants per workshop was approximately 100 apps per \$10K funding. Further analysis, incorporating a full year of event data, will be necessary to validate this finding.
- **Programs offering events smaller than 50 applicants performed at efficiency levels near the NAC-wide median.** No clear differences appeared among programs offering events of averages sizes 1, 2, or 3.<sup>14</sup>
- **Data are insufficient at this time with respect to events larger than 99 attendees.**

<sup>13</sup> The size categories were those recommended by Harder+Company, with the following modification: the smallest Harder category (0 to 24) was subdivided into three additional categories: "0" = 0-1 applicant (i.e., one-on-one processing – not included in our analysis), "1" = 2-9; and "2" = 10 to 24. With that modification, our analysis used the same categories as Harder + Company for groups of sizes 3, 4, and 5.

Further analysis, using cost data collected at the event level, is needed to assess the efficiency of these larger workshops.

#### 4) Impact of Leveraging Grant Funding with Non-Grant Resources

An extremely important way in which the NAC is generating more apps and fee waivers is to capture and deploy resources for NAC project activities that are available for free or at low cost in the community. These increase the “efficiency” measure by raising the numerator of the efficiency equation (numbers of apps and fee waivers generated) without adding to the denominator (hard-dollar funding).

Non-grant resources reported by NAC local partners and quantified in our study consisted of the following:

- **In-kind resources from the community**, such as media placements donated by local radio and TV stations.
- **Volunteer resources** consisting of person-hours donated by lawyers, BIA-accredited representatives, and other members of the community helping out at events or working in local partners’ offices.

In addition, the scarcity of grant funding for immigration legal services generally has prompted NAC partners to supplement grant resources with:

- **Subsidies from NAC partners’ general operating budgets** in the form of paid staff time devoted to NAC-related activities but not charged to grants specifically designated for naturalization services.<sup>15</sup>

To estimate the impact of these resources on efficiency performance, we grouped the local partners according to the ratio of their non-grant resources to grant resources. We classified all local partners according to whether their ratio of non-grant to grant resources was above or below the median of 100 percent computed for NAC local partners as a whole.

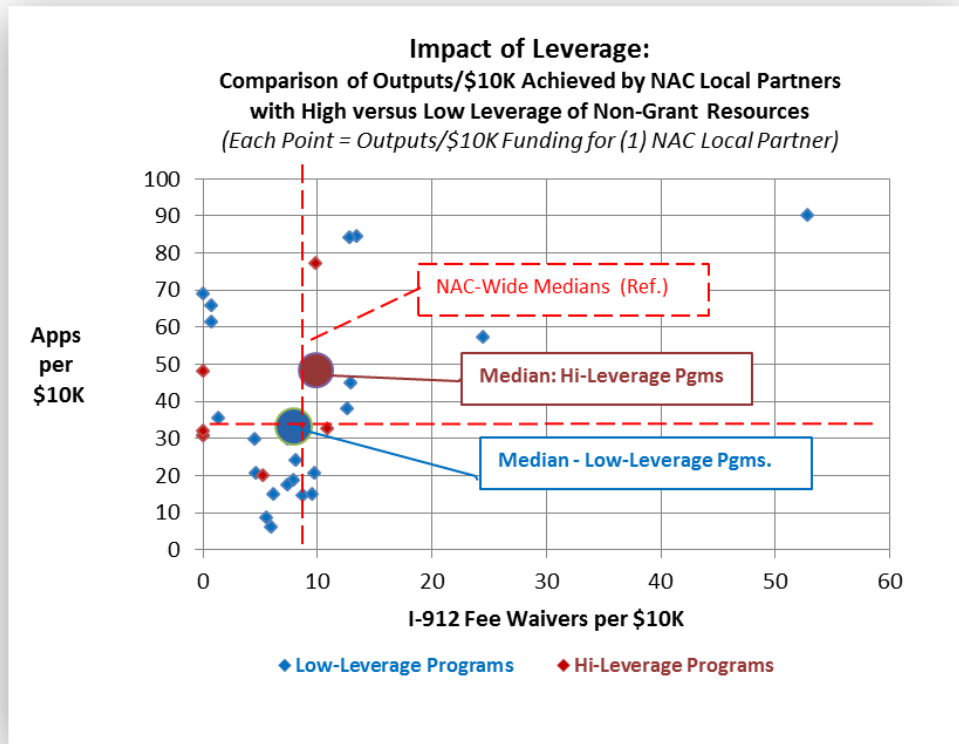
Exhibit 5.3 on the next page summarizes the results of that analysis. The high-leverage programs (indicated by red markers in the graph) were located higher vertically (that is, generating higher numbers of naturalization applications) and further to the right (that is, generating higher numbers of I-912 fee waivers) than low-leverage programs, indicated in the graph by blue markers.

At 48 apps per \$10K funding, the median output for high-leverage programs was 45 percent higher than that of the low-leverage programs, which performed essentially at the NAC-wide median of 34.

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<sup>15</sup> A further source of “informal” in-kind from organizations consists of NAC project staff working evenings and weekends on a regular basis, which has a significant impact on the number of applications and fee waivers that NAC local partners are able to produce per \$10K in grant funding. But see our caveat about this factor in the discussion of our outlier analysis later in this chapter.

### Exhibit 5.3:



### 5) Impact of Using CitizenshipWorks

Because data were limited, we were unable to quantify the cost and efficiency impacts of CitizenshipWorks (CW) in this study, but in an engagement prior to, and separate from, this financial analysis, we evaluated the use of CitizenshipWorks (CW) while it was being tested in four pilot sites that were local partners in the NAC. That study<sup>16</sup> was conducted in June-December, 2013, the first half of Year 2 of the NAC.

As outlined in the final report, that evaluation produced several findings pertaining to the efficiency of producing of naturalization applications:

- *CW demonstrated its feasibility* for use in group processing and individual assistance (one-on-one) models.
- *CW has the potential to significantly increase the numbers of naturalization applicants that a legal services provider organization can process* with its existing resources of staff, volunteers, facilities, and budget. In particular, it enhances efficiency by:
  - *Reducing the ratio of volunteers and/or interns per applicant* needed for

<sup>16</sup> The Resource for Great Programs, “Report on the Evaluation of the Use of CitizenshipWorks in the New Americans Campaign, 2013; available on the Web at [http://www.citizenshipworks.org/resources/item.463633-Report\\_on\\_the\\_Evaluation\\_of\\_the\\_Use\\_of\\_CitizenshipWorks\\_in\\_the\\_New\\_American](http://www.citizenshipworks.org/resources/item.463633-Report_on_the_Evaluation_of_the_Use_of_CitizenshipWorks_in_the_New_American) .

screening and application preparation.

- *Freeing up scarce resources (lawyers and BIA-authorized representatives) to focus on the more critical tasks requiring their expertise, such as complex cases and final quality review of completed applications.*
- *CW enables applicants to work on their citizenship applications in their native language, promoting better understanding of the citizenship process and a greater sense of empowerment.*

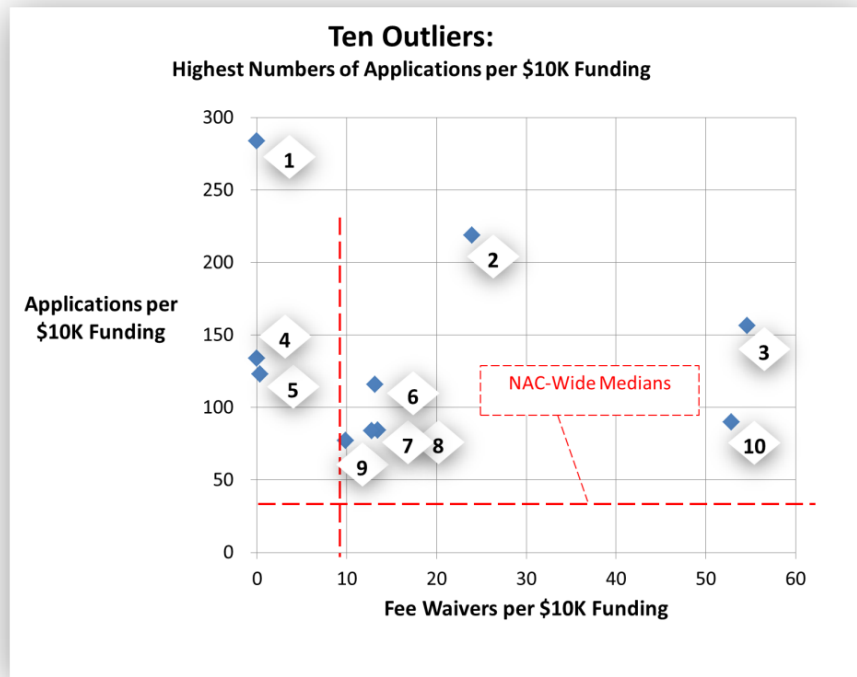
#### d. Analysis of 10 “Outliers” for Insights about Factors that Support High Efficiency

Sometimes it is productive to look at extreme examples – “outliers” – and review both qualitative evidence and quantitative factors for clues as to possible explanations for their exceptionally high performance. Commonalities and differences among the organizations can provide insights that potentially suggest best practices for adoption by other organizations operating under similar circumstances.

In the analysis described below, we selected the 10 NAC local partners that scored highest on output of naturalization applications per \$10K of funding – that is, they all were located farthest upward in the scatter plot of naturalization applications and fee waivers per \$10K funding shown in Exhibit 5.1.

These 10 outliers are highlighted in **Exhibit 5.4** below, and information about their situations regarding major factors affecting efficiency are summarized in **Exhibit 5.5** on the next page.

**Exhibit 5.4**



**Exhibit 5.5:  
Summary of Performance Factors  
for the 10 Outlier Programs  
Shown in Exhibit 5.4**

Identifier in Exhibit 5.4:	1	2	3	4	5	6	7	8	9	10
Output: Apps per \$10K Funding	284	219	156	134	123	116	90	84	84	77
Output: Fee Wavers per \$10K Funding	0	24	55	0	0	13	53	13	13	10
<b>Challenges ( ● = Significantly Above Benchmark and/or Major Theme in Narrative Materials; ○ = Slightly Above Benchmark)</b>										
Language Diversity				●						●
Outreach Challenges	●		●	●	●	●				●
Lack of Volunteer Resources						●				
<b>Assets ( ● = Significantly Above Benchmark (Median); ○ = Slightly Above Benchmark)</b>										
VOLUNTEER Resources Above Benchmark	●		●		●	●	●			
PROGRAM Supports NAC Activities from Operating Funds							●		○	
IN-KIND above Benchmark					●			○		●
GROUP PROCESSING Used for High % of Apps	●	●	●		●	●		●		
AVERAGE GROUP SIZE = 50-99	●	●	●		●	●				
Staff Cost per FTE Below Benchmark	●	●		●				○		●

The performance of the 10 outliers indicated in Exhibits 5.4 and 5.5 provides support for the following findings of our study:

- 1) **Leveraging of non-funding resources is a key to serving more people with the funding resources that are available.**
  - **Six** of the outlier programs (numbers 1, 3, 5, 6, 7, and 8) deployed volunteer and/or in-kind resources at levels above the medians that were seen across the 43 programs in the study.
  - **Three** of those programs that deployed volunteers extensively (numbers 1, 3, and 5) placed in the top five on measures of outputs per \$10K funding.
- 2) **Use of group processing at optimal size enables programs to achieve high numbers in situations where this approach is applicable.**
  - **Six** of the outlier programs (numbers 1, 2, 3, 5, 6, and 8) used group processing as their primary method of service delivery – that is, they produced 80 percent or more of their applications by this method rather than by one-on-one service.
  - **Four** of those programs (numbers 1, 2, 3, and 5) placed in the top five in terms of outputs per \$10K funding.

- **Five** of the six programs reported average event sizes ranging from 50 to 99 applicants served per event.
- **A caveat about group processing:** It may be significant that the populations served by eight of the 10 outlier programs were relatively homogeneous – that is, had “language diversity” scores of 2 or less. This may be a situation for which group processing is especially feasible and advantageous. Neither of the two outliers that served language-diverse populations (i.e., 3 or more languages) used group processing to a significant extent. (Also see finding “4” below regarding language diversity).<sup>17</sup>

**3) Low program operating costs are a significant factor in programs’ ability to achieve high output with a given amount of funding.**

- **Half** of the 10 outlier programs had average total estimated program costs below \$41,000 in total funding per full-time equivalent (FTE) staff lawyer (or equivalently paid staff person). This was roughly half of the median value of this measure (\$78,000) across the 43 programs in the study.
- **A caveat about this finding:** This may reflect under-reporting of costs by the five programs. (Recall that the data reflect retrospective estimates, rather than contemporaneous tracking.)
  - If the cost data submitted by these five programs were *not* accurate, then the programs’ status as “outliers” would be called into question.
  - If these figures *were* accurate, then a next question might be: is this cost level sustainable at an acceptable level of service quality? If the low costs rely on paying extremely low salaries, or on staffs’ working exceptionally long hours, then “making the numbers” by maintaining extremely low costs might not be as wise a practice as, say, leveraging non-funding resources or deploying efficient work processes.<sup>18</sup>

The performance of the outliers also underscores the following:

**4) Language and cultural diversity in the population to be served presents a significant challenge** in producing high numbers of applications for a given amount of funding.

- **Only two** of the 10 outlier programs (numbers 4 and 10) served highly language-diverse populations – that is, served applicant populations in which three or more languages were the primary languages spoken by five percent or more of the applicants served at their events.

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<sup>17</sup> The language diversity measure consisted of the number of languages other than English spoken by five percent or more of the applicant population served.

<sup>18</sup> While this method of dealing with resource scarcity is a common practice in immigration legal services programs generally, it can undermine efficiency over the long run by promoting staff burnout and high turnover. The consensus that has emerged from extensive examination of this issue in the legal services community nationally is that low pay and/or long working hours as standard practices can ultimately be counterproductive from the standpoint of staff morale and productivity, and should be avoided.

## e. Conclusions from Chapter 5

This study made extensive use of both the financial data and the qualitative information collected by the NAC, supplemented by the web survey of local partners conducted specifically for this analysis, to explore the impact of several factors on costs and efficiency at the local partner level. The factors that emerged as most significant were primarily the situational variables that local partners face in their communities, such as language and cultural diversity of the immigrant populations being served and the geographic challenges posed by large, sprawling service areas with highly dispersed immigrant populations and little or no public transportation infrastructure.

Less clear were the results of our inquiry into service delivery options such as the choice between group processing and individual, one-on-one service, and on the location of the “sweet spot” – the optimal group processing event size for serving a particular applicant population.

One conclusion we can reach with the information already in hand is that one size does not fit all. It is clear, for example, that some of the 10 programs that were “outliers” in terms of exceptionally high output per \$10K of funding used a significant amount of one-on-one processing to serve their clients, while others perform at an equally high level of efficiency using group processing as their primary service delivery approach. What is best depends on the specific circumstances faced by a particular local partner in the context of its mission and its goals for serving its clients.

Further analysis, using better data than were available for this study, might enable the NAC to put the impact of these factors affecting efficiency into sharper focus. The next chapter explores these same issues at the “site” level, concluding with observations that may provide opportunities for discussions among site members as learning communities that will lead to continuous improvements in efficiency in the near future.

## f. Recommendations for Improving Efficiency at the LOCAL PARTNER Level

- 1. Optimize the delivery approach.** Continue to seek the optimal mix of service delivery methods for achieving the best efficiency. These must be considered in light of the specific challenges and opportunities shown by this study to have the greatest impacts on efficiency.
- 2. Expand non-funding resources.** Especially crucial are efforts to strengthen recruitment, training, and support for *volunteers*. These were shown in our study to be a key lever for maximizing the numbers of applications that can be produced with a given amount of funding resources.

### Recommendations for Improving Efficiency at the Local Level

- **Optimize the delivery approach.**
- **Expand non-funding resources.**
- **Deploy technology.**
- **Replicate lessons revealed by “outliers.”**
- **Measure and track progress.**



3. ***Deploy technology.*** CitizenshipWorks (CW) was shown in a previous evaluation to allow for using volunteers and interns most efficiently in group- and one-on-one processing. Other technology-based tools could have a big impact in efforts aimed at improving efficiency.
4. ***Replicate success.*** The 10 “outlier” programs can provide relevant best practices for programs working in similar circumstances.
5. ***Measure and track progress.*** Deploy performance-based management at the local level, using the benchmarks developed in this study to assess the impact of ongoing adjustments being made in efforts to maximize the numbers of people who can be served with finite staff and funding resources. Tracking key cost and output variables on an ongoing basis at an “event” level of aggregation could provide ongoing, data-driven feedback to local partners and national partners regarding how they are doing on key measures of efficiency, enabling the people in the field to correlate their performance with adjustments they are making in such factors as, e.g., how they are recruiting and deploying volunteers in their events.

## Chapter 6: Assessing Financial Performance at the *SITE* Level in Eight NAC Cities

### a. Overview

This chapter presents our findings at the *site* level of analysis. Key questions we have answered include: How does the cost of completing naturalization applications vary across the eight sites? What are the factors that might explain this variation? What can we learn by examining the experience of the sites to date, through comparing and contrasting the ways in which the eight collaborations have applied their resources in the specific context of the contributors or barriers to efficiency that exist in the areas each serves?

First, we quantify and compare the resources deployed by each site in terms of their breakdown among the categories of funding, in-kind contributions, and volunteer person-hours.

Next, we describe the site-level factors that potentially have the greatest impact on efficiency according to the themes that arose from our review of the reports submitted by the sites and from the interviews conducted by Harder+Company. These include the opportunities that favor efficiency, the challenges that hinder it, and the variables in the NAC that potentially can enhance efficiency, such as the types and amounts of support provided by the national partners.

We then provide a summary description of each of the eight sites that highlights the presence or absence of the factors that we have identified as possible contributors or barriers to efficiency.

Finally, we present our findings regarding the links between efficiency and the contributors or barriers to efficiency faced by each site. We highlight examples from the eight sites that offer insights about how efficiency might be improved in the future

### This Chapter at a Glance

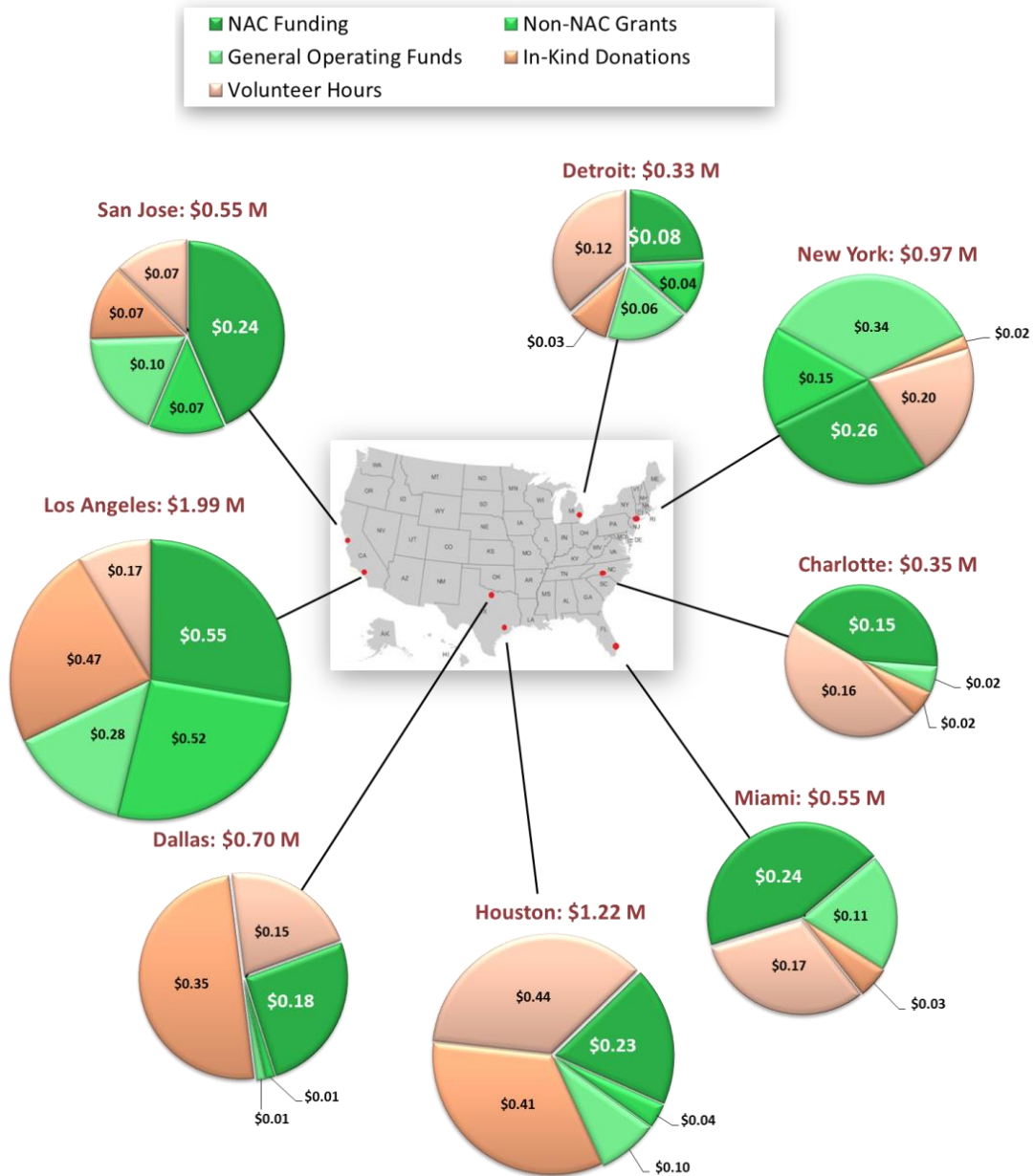
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through further exploration, and possible replication, of best practices. Potentially these will point the way to funders for an investment strategy that drives improvements to maximize effectiveness.

**b. Resources Deployed at the Site Level for Producing Applications and Fee Waivers**

The resources deployed by the eight NAC sites are summarized in Exhibit 6.1.

**Exhibit 6.1:**  
**Total Resources Deployed by Eight NAC Sites**  
*Area of Each Circle is Approximately Proportional to Total Resources Deployed.*



*A Financial Analysis of Application Completion in the New Americans Campaign*  
 Chapter 6: Assessing Financial Performance at the Site Level in Eight NAC Cities

**c. Factors that Affect Performance at the Site Level**

The reports submitted by local partners and notes from the interviews conducted by Harder+Company contained several repeating themes about factors that potentially affect the difficulty, and thus the cost, of producing applications at the eight sites examined in our analysis.

**Exhibit 6.2** below summarizes the eight NAC sites according to the presence or absence of these factors.

**Exhibit 6.2:  
Summary of Factors Affecting Cost, by Site**

	Charlotte	Dallas	Detroit	Houston	Los Angeles	Miami	New York	San Jose
<b>I. Opportunities Highlighted in Narrative Materials</b> (● = Major Theme in Narrative Materials; ○ = Mentioned in Some Materials)								
A. Abundance of Groups Serving Immigrants					●		●	
B. Good Coverage by Ethnic-based Media	●	●		●	●	●		
C. Availability of Pools of Volunteers				●				
D. Public Transportation Infrastructure in Place							●	
<b>II. Challenges Highlighted in Narrative Materials</b> (● = Major Theme in Narrative Materials; ○ = Mentioned in Some Materials)								
A. Language Diversity and/or Cultural Isolation of Target Population	●		●	○				
B. Widely-Dispersed Immigrant Population	●	●	●	●	●			●
C. Lack of Collaborative Structure Prior to NAC	●	●	●	●				●
D. Lack of Media Serving Non-English Speakers	●							

The site-level factors summarized in Exhibit 6.2 consist of the following:

- **Opportunities that *Favor* Efficiency:**
  - **Pre-existing networks.** In some sites, networks of non-NAC organizations serving immigrants were already in place when the NAC was launched. These included community organizations, faith-based organizations, media serving non-English-speaking immigrants, and legal service providers.
  - **Pools of volunteers.** Some sites have found it relatively easy to recruit volunteers through community networks such as those identified above, while others have worked effectively through other sources such as local colleges, law firms, employers, and direct appeals to the community.
  - **Sources of free or low-cost facilities and other in-kind resources.** These include community centers, places of worship, libraries, schools, and colleges.
  - **Public transportation infrastructure.** This factor is favorable in New York City, but almost totally lacking in some other cities, notably Detroit and Charlotte. It affects the ability of low-income applicants to turn out in large numbers at events offered by the NAC partners.
- **Challenges that *Hinder* Efficiency**
  - **Cultural or demographic challenges.** These include language diversity, poverty, low literacy in one's native language as well as English, and lack of computer literacy, any of which makes outreach and service delivery more costly.
  - **Lack of free or low-cost resources.** Volunteer resources or opportunities for garnering in-kind contributions are limited in smaller and/or economically depressed sites. This means that more funding is needed to achieve a given level of output compared with NAC sites that have greater access to free or low-cost resources.

In addition to the factors shown in Exhibit 6.2, there are three other variables within the NAC itself that conceptually can impact efficiency:

- **Capacities of the individual local partners.** Local partners vary over a wide range in terms of the resources they can offer to the joint effort as well as their capacity to efficiently produce naturalization applications. (This topic is explored further in Chapter 5, in our analysis of efficiency at the local partner level.)
- **Support from the national partners.** Each of the national partners has a unique mix of capacities for providing such resources as training, technical support, coordination, skilled site leaders, and direct assistance to applicants at the local sites.
- **Collaboration and coordination.** In the process of organizing the local partners into a cohesive collaboration, each site has developed a unique mix of

relationships and methods for working together. This was a major focus of the Harder+Company evaluation and is outside the scope of this financial analysis, but it conceivably impacts a site's capacity to achieve economies of scale and/or synergies that enable the partners to produce more applications collectively than they could individually with a given amount of resources.

- **Adequacy of funding available to the local partners.** This analysis has produced a first picture of the full range of resources being deployed at the eight sites beyond the NAC funding that was the focus of the preliminary cost analysis by ILRC. Our analysis has not fully examined the question of how adequate the total resources of a site are in relation to the challenges it faces such as those listed above. But adequacy of resources conceivably is a factor that can affect efficiency and represents a potentially fruitful topic of exploration in the future as the data collected in this study are mined for further insights about performance.

#### **d. Descriptions of the Eight NAC Sites**

The descriptions that follow are based on our comprehensive review of the qualitative information from reports submitted by local partners and from notes from the interviews conducted by Harder+Company.

1) **Charlotte, NC Exhibit 6.3** below summarizes the national and local NAC partners and non-NAC entities that make up the Charlotte site, and highlights some of the major challenges that figure prominently in the picture of this site that emerges from the review of narrative reports, Harder+Company interview summaries, and other qualitative information that we reviewed as background for the financial analysis.

Charlotte is the smallest of the eight NAC sites in terms of number of local partners, with just three. It also differs from the other sites in terms of service area characteristics; that is, unlike New York, Los Angeles and Miami, the Charlotte site serves a sprawling region in North Carolina characterized by relatively small, often isolated immigrant communities scattered across multiple cities and towns.

In this and other respects, the Charlotte site is typical of the many sections of the United States between the coasts and outside the large urban centers, like Dallas and Houston, which have dense populations of immigrants.

**Exhibit 6.3:**  
**The Charlotte Site at a Glance**

**1. National Partners: AAAJ, CLINIC, NALEO**

**2. Local Partners:**

**AAAJ Affiliate:**

- *Southeast Asian Coalition (SEAC)*

**CLINIC Affiliate:**

- *Catholic Charities Diocese of Charlotte (CCDOC) (Site Leader)*

**NALEO Affiliate:**

- *Latin American Coalition*

**3. Non-NAC-Funded Participating Entities:**

- **Faith-based organizations** – e.g., Russian-speaking churches and a Montagnard congregation in Greensboro, home to the largest Montagnard population outside of Vietnam.
- **Charlotte School of Law** – Provides interns who help at events.
- **Latino Chamber of Commerce**
- **Local libraries**
- **Others** – e.g., universities, student groups, and museums.

**4. Challenges Affecting the Cost of Providing Services:**

- **Lack of a pre-existing collaborative structure** among organizations serving immigrants in the region.
- **Language diversity** making it necessary to have translators in multiple languages and dialects, with clients speaking Russian, Ukrainian, Hmong, Spanish, Jarai, Rhade, Vietnamese, Russian, and Ukrainian.
- **Low levels of literacy** in language of origin, in English, and in computer use.
- **Scarcity of civics/English classes** in the area.

**Total Resources: \$0.35M**  
Charlotte Site; Dollar Values in Millions

Resource Category	Dollar Value (Millions)	Percentage
Volunteer Hours	\$0.16	46%
NAC Funding	\$0.15	43%
In-Kind Donations	\$0.02	6%
General Operating Funds	\$0.02	5%



## 2) Dallas, TX

**Exhibit 6.4** below summarizes the national and local NAC partners and non-NAC entities that make up the Dallas site, and highlights some of the major challenges that figure prominently in the picture of this site that emerges from the review of narrative reports, Harder+Company interview summaries, and other qualitative information that we reviewed as background for the financial analysis.

Dallas is among the smallest of the eight NAC sites in terms of number of local partners, with four, but encompasses a vast service area of urban and rural communities across more than two dozen counties, testing applicants' ability to reach the nearest naturalization service provider and requiring significant investment of vital resources of local partners conducting outreach and educational activities.

Poor English literacy among predominantly Spanish-speaking immigrant groups in the service area also poses a significant challenge to local partners seeking to inform Lawful Permanent Residents about the benefits of citizenship. To overcome these hurdles, partners are collaborating and leveraging public and private sector resources.

### Exhibit 6.4: The Dallas Site at a Glance

#### 1. National Partners: CLINIC, IRC, NALEO

#### 2. Local Partners:

##### CLINIC Affiliates:

- Catholic Charities/Dallas (Site Leader)
- Catholic Charities of Ft. Worth

##### IRC Affiliate:

- IRC Dallas

##### NALEO Affiliate:

- Proyecto Inmigrante

#### 3. Non-NAC-Funded Participating Entities:

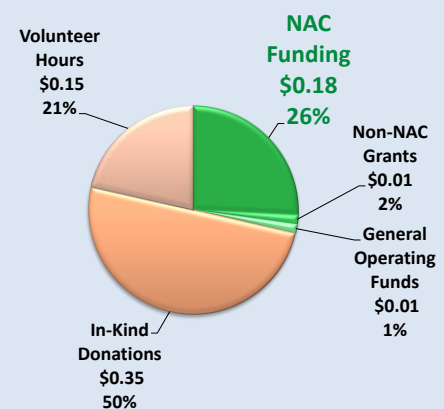
- In the first quarter of Year 3, the events hosted by the Dallas site's local partners engaged at least 25 **private sector entities and/or government/public agencies** that participated through sponsorship, in-kind donations, presence at the event, or other forms of participation.
- **Local partners continue to cultivate** and take advantage of relationships with other community organizations that have provided venues and other support for naturalization workshops, including:
  - Faith-based organizations
  - Community centers
  - Universities
  - Schools

#### 4. Challenges Affecting the Cost of Providing Services:

- **A low level of English literacy** continues to be a key reason for immigrants not becoming U.S. citizens, with local partners serving a predominantly Spanish-speaking population.
- **Vast service area** covering urban and rural regions tests applicants' ability to reach the nearest naturalization service provider and demands vital **resources of local** partners to conduct outreach and educational activities. Local partners recently served applicants in the Dallas-Fort Worth area from 59 different cities across 19 counties.

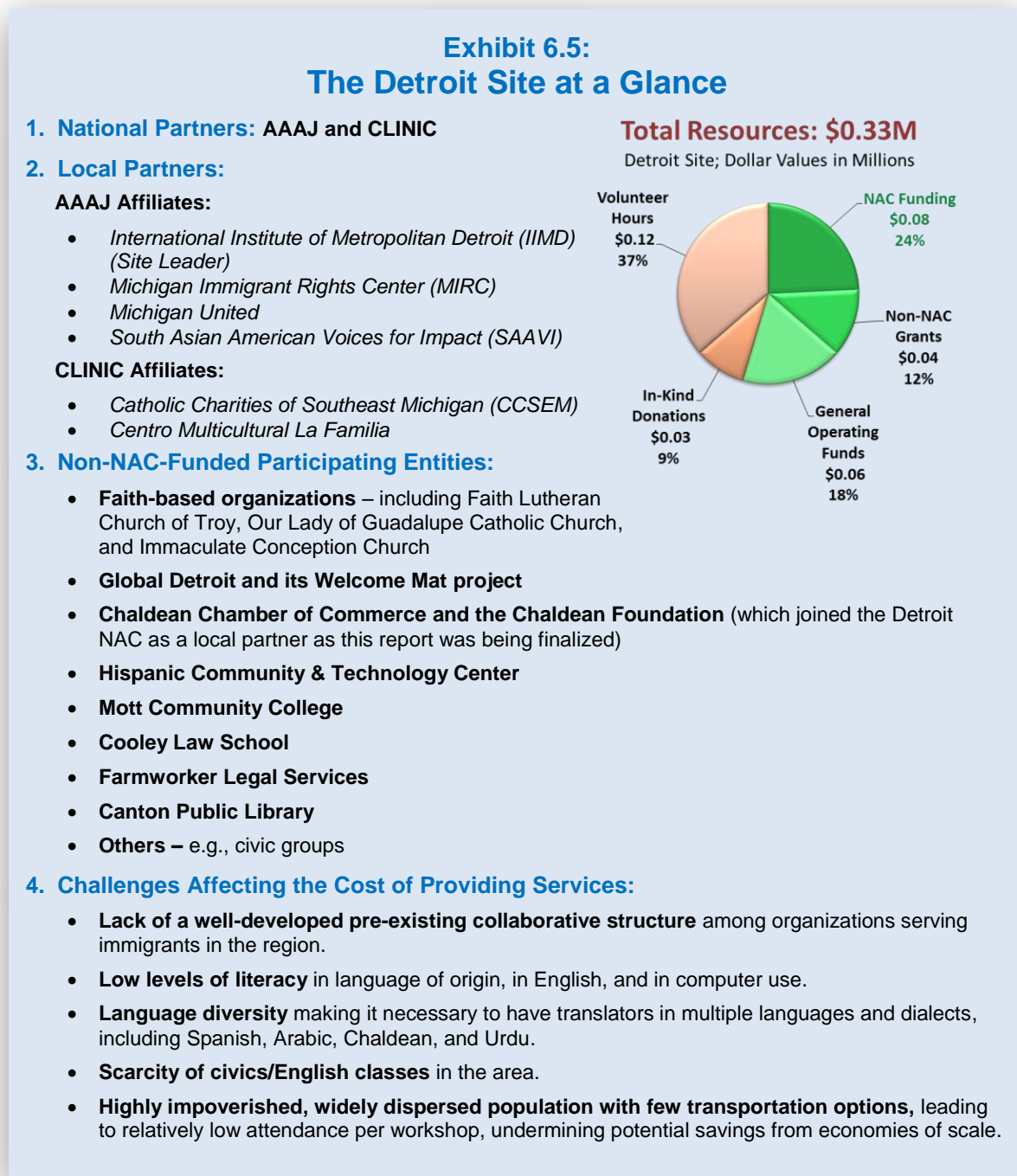
#### Total Resources: \$0.70M

Dallas Site; Dollar Values in Millions



### 3) Detroit, MI

**Exhibit 6.5** below summarizes the national and local NAC partners and non-NAC entities that make up the Detroit site, and highlights some of the major challenges that figure prominently in the picture of this site that emerges from the review of narrative reports, Harder+Company interview summaries, and other qualitative information that we reviewed as background for the financial analysis.

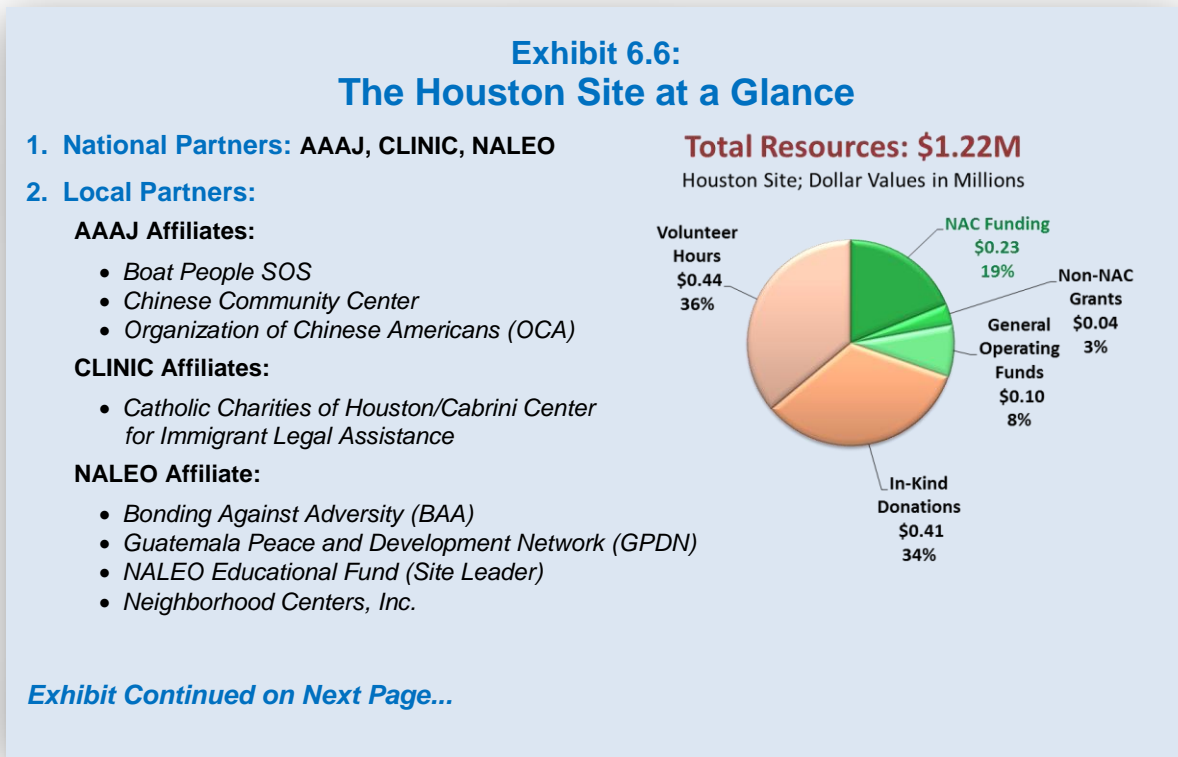


Detroit’s six local partners operate in a highly depressed economic environment: the region has been marked for years by population and job loss and the city itself filed for bankruptcy in July 2013. Prior to the NAC, funding for naturalization service delivery in the Detroit area had been scaled back and, in some cases, eliminated altogether, creating competition among organizations for dwindling resources.

Local partners serve a large geographic area that spans not only Detroit but a broad swath of Southeast Michigan, where an estimated 73,000 green card holders – primarily from the Middle East, Latin America, and Eastern Europe – reside. Group processing events here tend to be among the NAC’s smallest, usually ranging from 10-30 participants, in part because of very limited public transportation options for a highly dispersed population.

**4) Houston, TX**

**Exhibit 6.6** below summarizes the national and local NAC partners and non-NAC entities that make up the Houston site, and highlights some of the major challenges that figure prominently in the picture of this site that emerges from the review of narrative reports, Harder+Company interview summaries, and other qualitative information that we reviewed as background for the financial analysis.



## Exhibit 6.6, Continued: The Houston Site

### 3. Non-NAC-Funded Participating Entities:

- In the first quarter of Year 3, the events hosted by the Houston site's local partners engaged at least 19 **private sector entities and/or government/public agencies** that participated through sponsorship, in-kind donations, presence at the event, or other forms of participation.
- **Local partners continue to cultivate** and take advantage of relationships with other community organizations that have provided venues and other support for naturalization workshops, including:
  - **Local government officials**
  - **Faith-based institutions**
  - **Colleges**
  - **Other community-based organizations.**

### 4. Challenges Affecting the Cost of Providing Services:

- **A low level of English (with clients speaking Mandarin, Cantonese, Spanish, Bengali, Vietnamese, Spanish, and Arabic) and computer literacy**, increasing the level of support needed and decreasing the ability to rely on technology, such as computers and CitizenshipWorks.
- **Language diversity** making it necessary to have translators in multiple languages and dialects to serve applicants speaking Mandarin, Cantonese, Spanish, Bengali, Vietnamese, Spanish, and Arabic.
- **Large service area** across sprawling metropolitan Houston tests applicants' ability to reach the nearest naturalization service provider and demands vital resources of local partners to conduct outreach and educational activities and build trust in more isolated communities.

Houston is among the largest of the eight NAC sites not only in terms of number of local partners, with eight, but also with its sprawling metropolitan service area.

Low levels of English (with clients speaking Mandarin, Cantonese, Spanish, Bengali, Vietnamese, Spanish, and Arabic) and computer literacy among many immigrant groups present a major impediment to local partners seeking to efficiently conduct outreach and run naturalization workshops. To overcome these barriers, partners are collaborating and leveraging public and private sector resources, and relying on best practices and lessons learned via the NAC.

## 5) Los Angeles, CA

**Exhibit 6.7** below summarizes the national and local NAC partners and non-NAC entities that make up the Los Angeles site, and highlights some of the major challenges that figure prominently in the picture of this site that emerges from the review of narrative reports, Harder+Company interview summaries, and other qualitative information that we reviewed as background for the financial analysis.

### Exhibit 6.7: The Los Angeles Site at a Glance

#### 1. National Partners: AAAJ, CLINIC, IRC, NALEO, National Immigration Forum (Bethlehem Project)

#### 2. Local Partners:

##### AAAJ Affiliates:

- Asian Americans Advancing Justice – LA (Co-Site Leader)
- Cambodian Association of America (CAA)
- FASGI
- Korean Resource Center
- South Asian Network

##### CLINIC Affiliates:

- Catholic Charities of LA

##### IRC Affiliates:

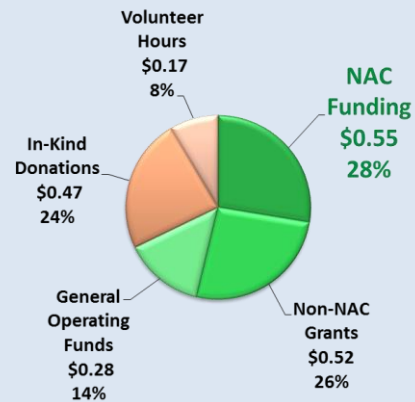
- IRC LA

##### NALEO Affiliates:

- California-Pacific Neighborhood Immigration Clinic (Cal-Pac NIC)
- Central American Resource Center (CARECEN)
- Centro CHA
- Coalition for Humane Immigrant Rights of Los Angeles (CHIRLA)
- Community Lawyers
- Greater Long Beach Interfaith Community Organization (ICO)
- Interfaith Refugee and Immigration Service (IRIS)
- Joseph A. Vail Center for Immigrant Rights (Vail)
- LA Voice (part of PICO)
- NALEO Educational Fund (Co-Site Leader)

**Bethlehem Project** of the National Immigration Forum (described in more detail on the next page)

**Total Resources: \$1.99M**  
Los Angeles Site; Dollar Values in Millions



**Exhibit 6.7 Continued on Next Page**

## Exhibit 6.7, Continued: The Los Angeles Site

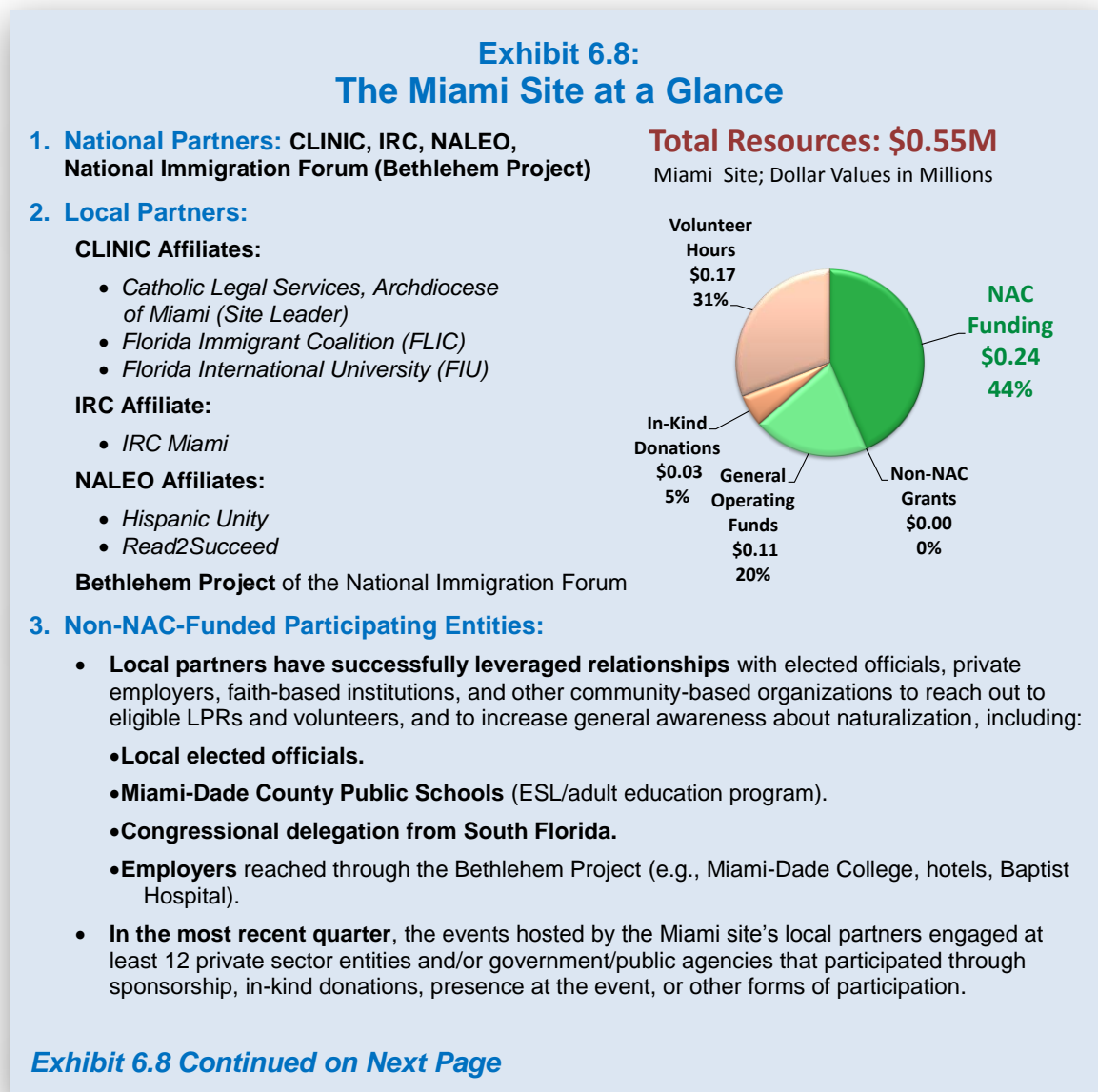
- 3. Non-NAC-Funded Participating Entities** – The Los Angeles site has strong relationships with agencies and organizations outside of the core NAC-funded partners. Some standout partnerships include:
- **The California Community Foundation (CCF)** – This is a key player in Los Angeles. CCF provides significant additional funding to NAC partners and other organizations for naturalization work. More importantly, they convene the LA citizenship “task force” on a monthly basis, which includes the Mayor’s office, LA Public Libraries, and the LA Chamber of Commerce.
  - **LA Public Libraries** – There are “citizenship corners” in all 73 public libraries. The partners are leveraging this key relationship to host naturalization events and disseminate information.
  - **Mayor’s office** – This relationship helped build the USCIS and library partnership. A staff member from the mayor’s office regularly attends monthly task force meetings.
  - **University of Southern California (USC)** – The partners work with USC faculty to present and conduct relevant research about LPRs. CCF commissioned a report that examined high-need, under-served communities that can be targeted for naturalization services. The partners utilize this data to provide targeted outreach and services.
  - **National Immigration Forum/Bethlehem Project and LA Chamber of Commerce** – The NAC’s Bethlehem Project and the LA Chamber of Commerce have helped build relationships with local employers, such as American Apparel. Partners see opportunities to expand their work with the private sector.
  - **USCIS LA** – Partners have developed a strong partnership with the local USCIS office. USCIS has had a presence at local group processing events.
- 4. Challenges Affecting the Cost of Providing Services:**
- **Language diversity** making it necessary to have translators in multiple languages and dialects; for example, Asian/Pacific Islanders who speak many different languages, driving the cost per application up. Languages of clients include Spanish, Vietnamese, Mandarin, Cantonese, Thai, Tagalog, Korean, Khmer, Hindi, Urdu, Bangla, and Punjabi.
  - **Broad geography** – Metropolitan Los Angeles encompasses a large portion of southern California, driving up costs to reach and serve immigrants, particularly when applicants require follow-up services after attending a group-processing event.
  - **Inconsistent turnout** – Some partners link an increase in the number of group-processing events to a decrease in the average number of attendees, as immigrants have more options for where and when to participate.
  - **Low levels of literacy** in language of origin, in English, and in computer use, requiring intensive assistance at workshops.

Los Angeles is the largest of the eight NAC sites in terms of number of local partners (17), with sub-granting provided by four national partners. Within the NAC, the local partners have been able to expand their reach into under-served communities across an expansive region. Partners are thinking strategically about how to expand the collaborative with more non-traditional partners in the public and private sector to continue to evolve their outreach efforts. The partnership with the Los Angeles public libraries is being leveraged to reach and serve LPRs in communities across the region,

providing partners with access to space, technology (computer labs and Internet), and the general public. Given the regional economy, the workplace is also viewed as a great opportunity capture LPRs that come from local and outside communities.

## 6) Miami, FL

**Exhibit 6.8** below summarizes the national and local NAC partners and non-NAC entities that make up the Miami site, and highlights some of the major challenges that figure prominently in the picture of this site that emerges from the review of narrative reports, Harder+Company interview summaries, and other qualitative information that we reviewed as background for the financial analysis.





## Exhibit 6.8, *Continued*: The Miami Site

### 4. Challenges Affecting the Cost of Providing Services:

- **Identifying LPRs who are ready to apply** and bringing them in, with key obstacles for potential applicants being the \$680 application fee, a generalized fear of the legal immigration system, and the logistical challenge of leaving work and traveling to reach a workshop.
- **Lack of mobility** among some immigrants, such as seniors and people with disabilities, requiring service providers to reach out in various ways, which can include one-on-one service and other labor-intensive support.
- **A low level of English literacy and wide language diversity**, making workshops inefficient for serving some populations and necessary to have translators in multiple languages and dialects (with most clients speaking Spanish or Haitian Creole) to serve diverse populations.
- **No-shows** are one of the major challenges in Miami, with significant numbers of clients not showing up for their appointments to complete naturalization applications.
- **Unprepared clients** who attend a naturalization workshop and then require very time-consuming and expensive follow up.

Miami is a mid-size NAC site with six local and three national partners, encompassing a broad service area with about 350,000 immigrants eligible to naturalize throughout Miami and all of Broward County down to the Florida Keys.

Miami is considered an “immigrant-friendly” area with widespread support for naturalization and other immigrant-related issues among elected officials and the general public.

The site leadership has an aggressive goal to make sure that every single group and geographic area is served, and everyone who is eligible to apply for citizenship can do so.

### 7) New York City, NY

**Exhibit 6.9** on the next page summarizes the national and local NAC partners and non-NAC entities that make up the New York site, and highlights some of the major challenges that figure prominently in the picture of this site that emerges from the review of narrative reports, Harder+Company interview summaries, and other qualitative information that we reviewed as background for the financial analysis.

New York is among the largest of the NAC sites, with four national partners coordinating eight local partners. New York is an immigrant-friendly state where local civic infrastructure is expanding in response to broad support for naturalization and immigrant integration services.

The city boasts a large numbers of community-based organizations providing outreach and direct services to immigrant groups, including Lawful Permanent Residents.

Local partners have expanded their network to include numerous non-NAC-funded allies, such as local libraries, educators, community-based organizations, consulates, businesses, and places of worship, resulting in increased publicity, referrals, and in-kind support.

Challenges remain, however, including difficulty attracting media attention in such a large market and low levels of English and computer literacy among immigrants interested in naturalizing.

### Exhibit 6.9: The New York Site at a Glance

**1. National Partners: AAAJ-LA, CLINIC, IRC, NALEO**

**2. Local Partners:**

**AAAJ-LA Affiliate:**

- *MinKwon*

**CLINIC Affiliate:**

- *Catholic Migration Office, Diocese of Brooklyn*

**IRC Affiliate:**

- *IRC NY*

**NALEO Affiliates:**

- *Church World Service*
- *CUNY Citizenship Now!*
- *Make The Road NY*
- *NALEO Educational Fund (Site Leader)*
- *Northern Manhattan Coalition for Immigrant Rights (NMCIR)*

**3. Non-NAC-Funded Participating Entities:**

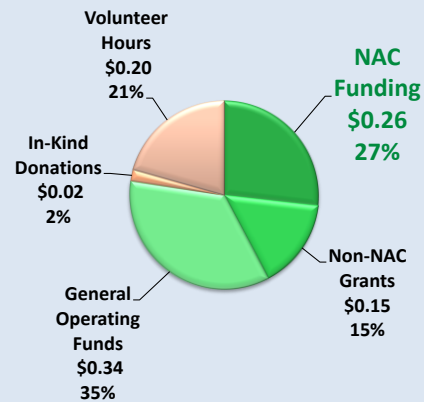
- **Local libraries** (e.g., Brooklyn Public Library)
- **Educators** (e.g., ESL teachers)
- **Community-based Organization's** (e.g., The Children's Aid Society)
- **Consulates** (e.g., Mexico and Colombia)
- **Businesses** (e.g., window factories, food processors, bakeries).
- **Places of worship** (including a local church's ESOL/civics programs)
- **The Office of New Americans (ONA)**, which funds a group of non-profits to provide naturalization assistance, statewide.

**4. Challenges Affecting the Cost of Providing Services:**

- **Decline in average attendance at workshops** undermining potential economies of scale, perhaps due to the fact that there is no presidential election on the horizon so interest in naturalizing for the purpose of voting is reduced.
- **Need for dedicated staffing** focused on outreach, including media relations.
- **Low levels of literacy** in language of origin, in English, and in computer use.
- **Scarcity of free or low ESOL service providers** to accommodate the current demand.
- **Language diversity** making it necessary to have translators in multiple languages and dialects.

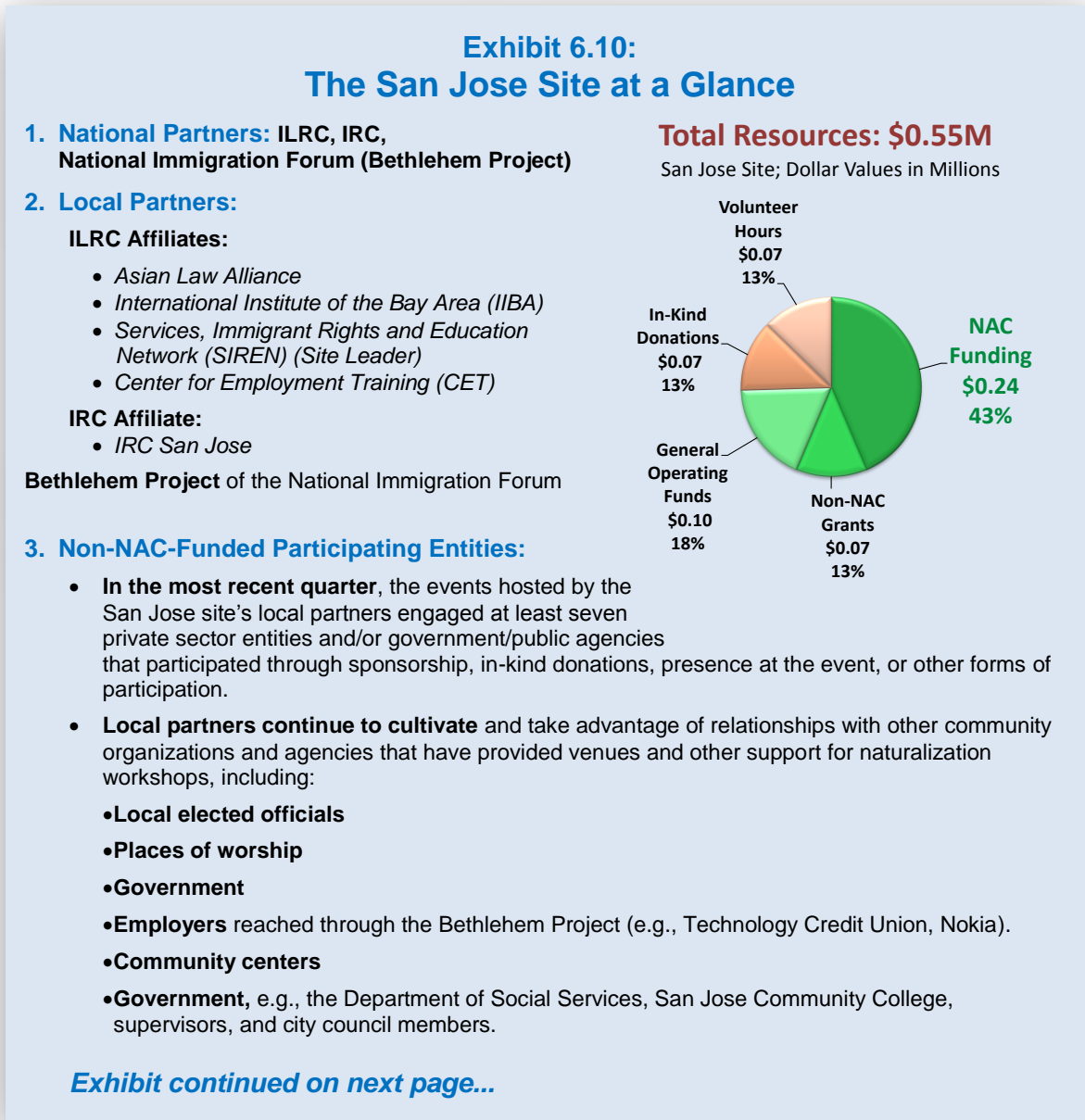
**Total Resources: \$0.97M**

New York Site; Dollar Values in Millions



## 8) San Jose, CA

**Exhibit 6.10** below summarizes the national and local NAC partners and non-NAC entities that make up the San Jose site, and highlights some of the major challenges that figure prominently in the picture of this site that emerges from the review of narrative reports, Harder+Company interview summaries, and other qualitative information that we reviewed as background for the financial analysis.



## Exhibit 6.10 (Continued): The San Jose Site at a Glance

### 4. Challenges Affecting the Cost of Providing Services:

- **A low level of English literacy and language diversity** – including Vietnamese, Tagalog, Spanish, and Chinese – among immigrants require significant, specialized assistance at group processing workshops, making it necessary to have translators in multiple languages and dialects.
- **Follow up appointments** for applicants who were not fully prepared to participate in a group event are resource intensive.
- **In-kind donations are becoming increasingly difficult to maintain**, as donors experience fatigue from repeated requests and limits as to how far they can stretch their resources in harsh economic conditions.
- **Volunteer burnout**, due to the frequency of naturalization events, is making recruitment more difficult and time consuming.
- **Outreach to diverse immigrant groups**, in their native language – including Vietnamese, Tagalog, Spanish, and Chinese – and through local ethnic media, is difficult and costly.
- **Not all embrace the model** - Local partners continue to explore how to ensure the quality of services provided at group processing events, given the lack of qualified volunteers and the time and effort required to train volunteers. Some non-funded partners also have questioned whether group processing provides the community with the highest quality services.

San Jose is in the middle of the size range among NAC sites with five local and two national partners, but unique in that all affiliates are equally funded by the NAC and share one site-level naturalization application goal to promote collaboration, which they achieve mainly through group processing while also equally distributing the residual individual application goals to promote accountability. Before the NAC, local partners who served similar populations generally thought of each other as competitors; now, they support each other to reach a common goal.

Poor English literacy and native language diversity – including Vietnamese, Tagalog, Spanish, and Chinese – among many immigrant groups require a high level of outreach and volunteer support to make naturalization events successful. The increased frequency of events over the course of the NAC has led to some volunteer burnout and difficulty with obtaining repeated in-kind donations. Despite the challenges, local partners have some interest in extending service to Monterey and Santa Cruz counties, if funding becomes available.

### e. Measures Used to Compare Performance of the NAC Sites

Two of the measures used in assessing the performance at the site level were the same as those used at the local partner level in Chapter 5 to compare outputs (completed applications and fee waivers) to the resources required to produce them:<sup>19</sup>

- *Apps per \$10K funding*
- *Fee waivers per \$10K funding*

An additional measure was used to explore the impact of leveraging of non-funding resources as a factor affecting the ability of a site's members to produce high numbers of applications and fee waivers for a given amount of hard-dollar funding they received:

- *The total non-NAC resources ratio* – the dollars in total non-NAC resources (including both funding and donated resources) per dollar of NAC funding at the site.

A fourth measure was used to explore the impact of language diversity in the applicant population as a factor driving the cost, and thus the efficiency, of completing applications in a site:

- *The language diversity index* – the number of languages comprising five percent of more of applicants served (excluding English).<sup>20</sup>

In the discussion that follows, we use “scatter plots” to display and compare the values of these measures for each site. Scatter plots enable us to visualize both the variation among the individual partners comprising a site and the “typical performance” (as measured by the median) of the members of a site as a collaborative group.

### f. Variations in Efficiency across the Eight NAC Sites

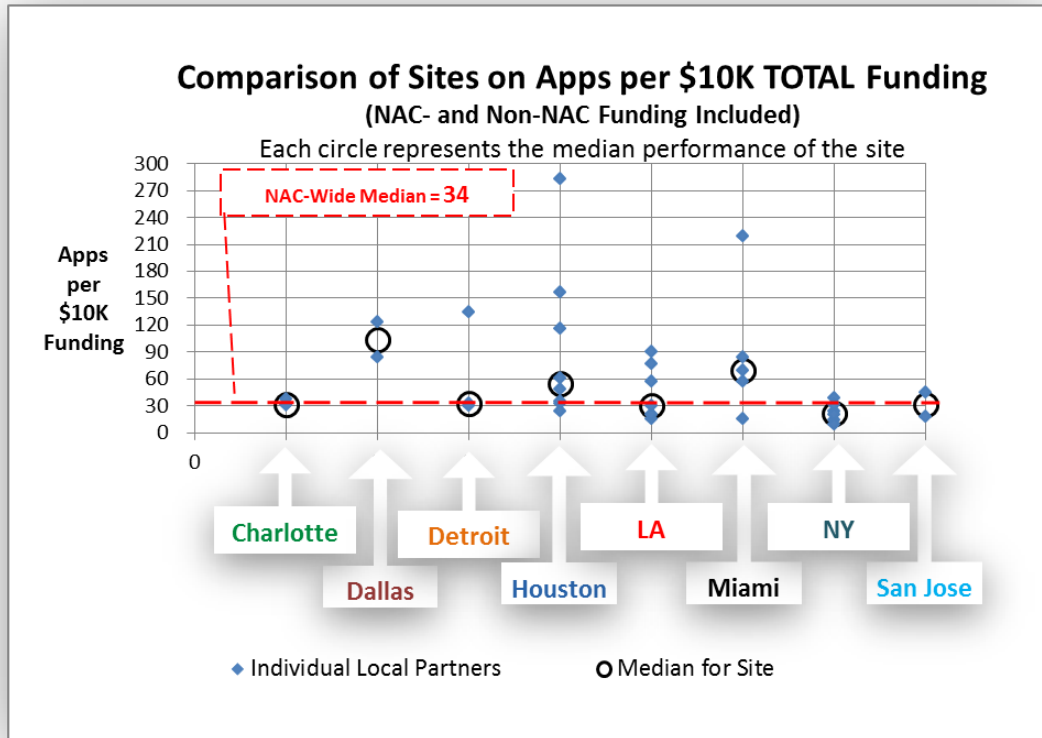
**Exhibit 6.11** on the next page displays the median and individual values of the apps per \$10K funding achieved by the local partners comprising each of the eight NAC sites.

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<sup>19</sup> See Chapter 4 for details regarding the measures that were used for assessing performance in the study.

<sup>20</sup> This measure was computed for each local partner based on the responses to two questions on our web-based survey regarding the principal languages spoken by applicants and the percentage of total applicants served by the NAC project who speak each language that was identified.

Exhibit 6.11:



Each small blue point in the graph represents the average output of apps per \$10K funding of *one* of the 43 individual local partners included in the study, displayed on the vertical axis. The programs are grouped by NAC sites, indicated on the horizontal axis of the graph. The circles in the graph indicate the “typical” performance of the partners comprising each site as indicated by the median of the measures for those partners.

Our observations from these data are as follows:

- Five of the eight sites cluster near, or just below, the median of (34) applications per \$10K funding.
- Three of the sites (Dallas, Houston, and Miami) produced at levels 2-3 times the median.
- There was wide variation among providers in Houston, Miami, and Detroit.
- There was low variation among providers in Charlotte, Dallas, LA, and NY.
- The local partners operate and report as a single unit in San Jose, except for IRC, and therefore there was relatively little variation apparent at that site.

Why the variation among providers? As we will see, the sites are not playing on a level playing field. They face varying challenges in serving particular applicant populations in the specific context of their local communities. And there are indications that some sites may have found methods for dealing with these variations that are especially effective.

**g. Factors that Affect Performance at the Site Level**

The following are factors that were discussed earlier in this chapter and explored below as potentially affecting performance of the eight sites:

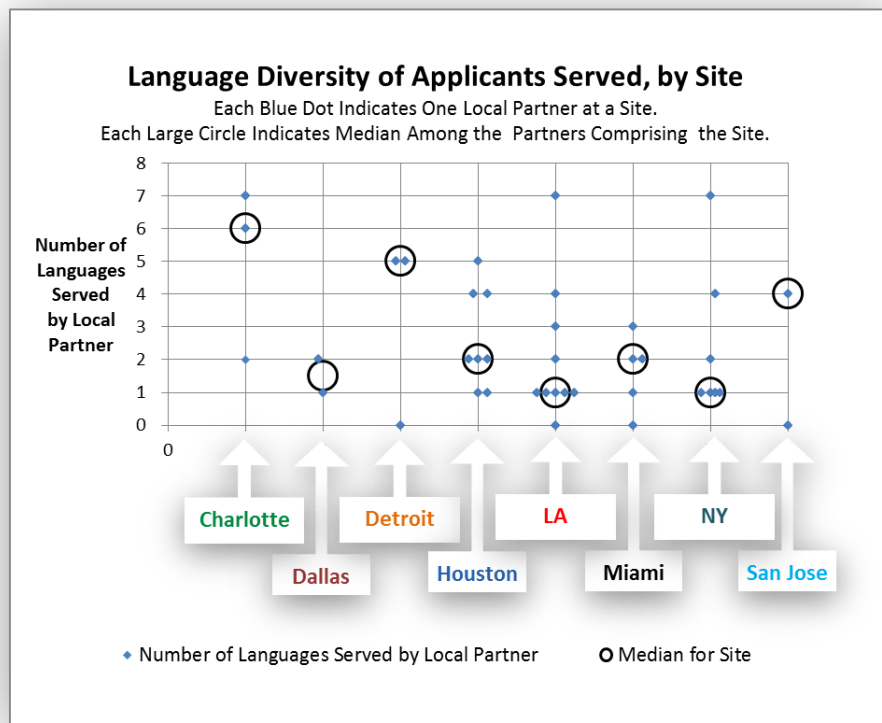
- Cultural/demographic challenges in the populations being served
- Leverage of non-grant resources
- Delivery approach – Group processing versus one-on-one services

**1) Language Diversity and Cultural/Demographic Challenges**

Both the anecdotal evidence (from interviews and grantee reports) and the quantitative data applied in this study suggest that language diversity among the applicant population being served is a significant factor affecting the efficiency with which a local partner is able to produce naturalization applications.<sup>21</sup>

**Exhibit 6.12** below indicates the language diversity reported by the local partners at each of the eight NAC sites. The vertical position of each small blue dot indicates the language diversity reported by one local partner. The large open circles display the median values of language diversity among the partners comprising each site.

**Exhibit 6.12:**



<sup>21</sup> See our quantitative analysis of this factor in Chapter 5.

Charlotte, Detroit, and San Jose stand out in Exhibit 6.12 as sites where the local partners serve highly diverse applicant populations. Dallas is at the opposite extreme: both local partners report serving primarily only one or two language groups (other than English.)

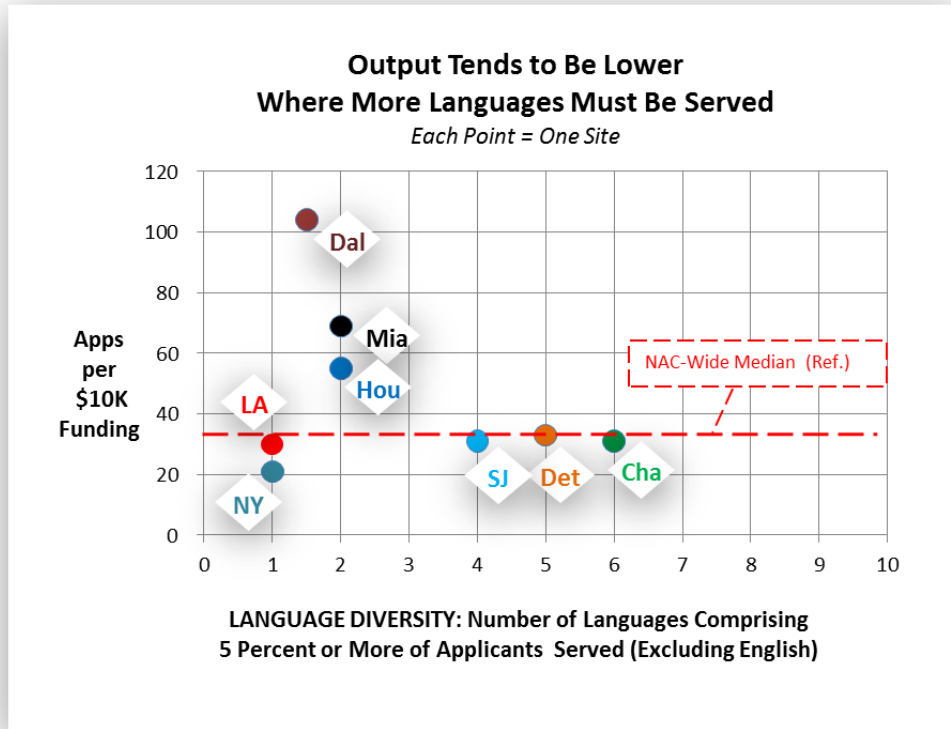
The other four sites lie between these extremes. Houston, Los Angeles, Miami, and New York each have their share of local partners that serve highly diverse populations – that is, serve applicants from three or more language groups. However, the “typical” (as indicated by the median) language diversity faced by the local partners at these sites is only one or two.

From our findings reported in Chapter 5, we would expect sites in which local partners “typically” face *high* language diversity to score *lower* on the apps per \$10K funding measure. Conversely, the sites where local partners face lower language diversity would score higher on our efficiency measure.

**Exhibit 6.13** below indicates a general conformance with that expectation. Efficiency (as measured by output in apps per \$10K funding) tended to be *lower* in sites having *high* language diversity – San Jose, Detroit, and Charlotte – because:

- Translation costs resources – time and translators.
- Cultural factors often accompany language diversity, making group processing and use of volunteers more challenging.
- Outreach is more difficult and expensive with more diverse applicant populations, and it’s harder to turn out large numbers of applicants for group events.

**Exhibit 6.13:**





Conversely, efficiency was highest in Dallas, Houston, and Miami, where local partners typically (as indicated by the median) faced lower language diversity.

It is also worth noting that the highest language diversities are found in Charlotte and Detroit, the sites which are smallest (in terms of numbers of partners) and most geographically dispersed. These cities are also lacking in public transportation, highly accessible ethnic media, and other efficiency-enhancing characteristics. This combination of challenges likely has a cumulative impact on their efficiency.

**2) Leveraging Grant Funding with Non-Grant Resources**

**Exhibit 6.14** below shows the median output of applications per \$10K funding of the local partners comprising each of the eight sites (plotted on the vertical axis), as a function of *leverage* (plotted on the horizontal axis) in terms of the average number of dollars the local partners were able to deploy per dollar of total funding they had to work with.

**Exhibit 6.14:**

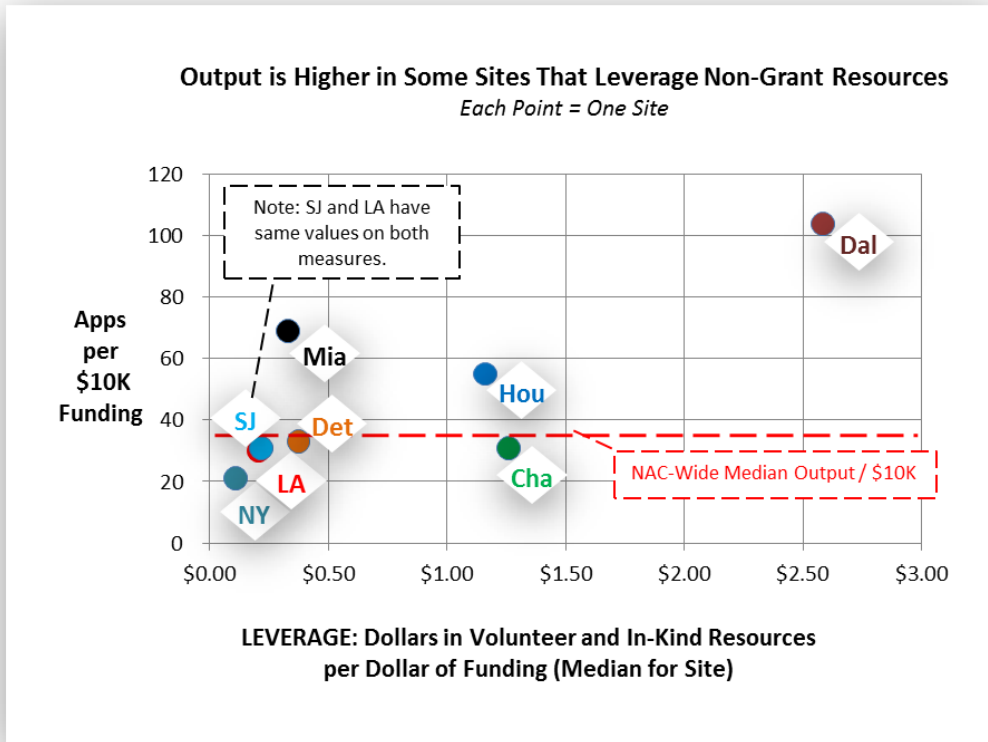


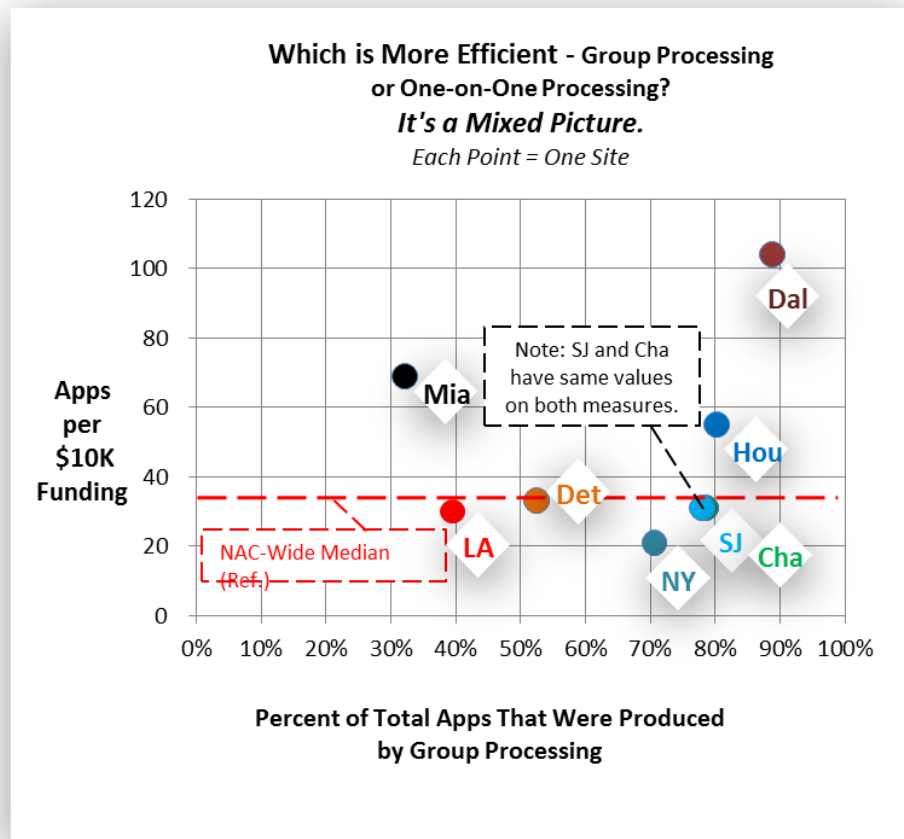
Exhibit 6.14 suggests a strong correlation between output per \$10K funding and leverage of non-funding resources. There is almost a straight line running from lower left to upper right connecting seven of the eight sites. The outlier is Miami, which achieved high output with low leverage of non-funding resources.

Non-funding resources – especially volunteers – are keys to the efficient use of group processing, a factor which we’ll discuss next.

### 3) Use of Group Processing versus One-on-One services

**Exhibit 6.15** below shows the median output of applications per \$10K funding (plotted on the vertical axis) of the local partners comprising each of the eight sites as a function of the percentage of total applications produced by the site’s members through group processing rather than one-on-one processing (plotted on the horizontal axis).

**Exhibit 6.15:**



Observations about this graph:

- A big caveat is that these initial findings are based on only one quarter’s worth of data – the event-level percentages reported by local partners for the first quarter of Year 3 – which were extrapolated to the apps per \$10K measures derived for Year 2. The findings should be validated by expanding to use more quarters of event data in a future analysis.

- With that caveat in mind, the graph shows a mixed picture regarding the efficiency-enhancing benefits of group processing when viewed at the “site” level. It shows two examples of high-output sites (Dallas and Houston) using primarily group processing, but also shows an “outlier” - a high-output site (Miami) using primarily one-on-one processing.
- A similarly mixed picture is seen when comparing the results achieved by the two sites serving the most language-diverse populations, Charlotte and Detroit. These achieved roughly the same output of applications per \$10K funding (31 and 33, respectively) while using quite different mixes of service delivery methods – Charlotte, 79 percent group processing versus Detroit with 53 percent group processing.

Apart from the caveat about these results being based on only one quarter’s worth of event-level data, another consideration must be acknowledged: at the site level, the benefits of group processing are likely subsumed among a host of other factors affecting efficiency among the local partners comprising a site. There is perhaps more to be learned in the future by looking at this question at the individual event level, along with the benefit of more detailed and reliable event-level data collected at the same time as the cost data which are being correlated with the “delivery approach” data.

#### **h. Revisiting the 10 “Outlier” Programs for Insights about Factors that Support High Efficiency**

The analysis above suggests that three sites – Dallas, Miami, and Houston – have median levels of output that are significantly above those of the other five sites.

Our exhaustive review of the narrative materials that are available for the eight sites – summarized in Exhibit 6.2 and further described in section d) above – provides ample evidence for the proposition that the reasons for high or low performance are complex and highly nuanced, and that no simple explanation for the differences in performance among sites is likely to be derived from statistical correlations alone.

That said, we have found in both this chapter, and in the local partner-level analysis in Chapter 5, associations between output per \$10K and two broad factors that also make sense at an intuitive level:

- Leveraging of non-funding resources leads to higher output for the funding dollars that are available;
- Use of group processing, at optimal group size, helps produce more applications at given cost when conditions are right – that is, where the applicant population to be served is relatively homogeneous and the volunteers to serve them are readily available.

These conclusions are supported by the information presented in Chapter 5 regarding “outlier” local partners – the 10 organizations that had the highest performance among the 43 local partners on measures of output per \$10K funding. Review of Exhibit 5.5 reveals the following:

- *Dallas* accounted for *two* of the 10 outlier programs shown in Exhibit 5.5..

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- Both programs served primarily Latino applicant populations that were relatively homogenous in terms of languages and culture.
- One of the programs made high use of volunteer resources; the other was above the median in terms of deployment of in-kind resources.
- Both programs used group processing as their primary mode of delivery.
- *Houston* accounted for *three* of the 10 “outlier” programs highlighted in Exhibit 5.5
  - Two of these programs served a Latino applicant population that was relatively homogenous in terms of language and culture. The other served a population that was 90 percent Vietnamese and 10 percent Latino – again less of a challenge to serve than those faced by programs serving three or more language groups.
  - All three of the programs made high use of volunteer resources.
  - All three of the programs used group processing as their primary mode of delivery.
- *Miami* accounted for *two* of the 10 “outlier” programs highlighted in Exhibit 5.5
  - Both of these programs served Latino applicant populations that were relatively homogenous in terms of languages and culture.
  - One of the programs used group processing as its primary mode of delivery.

Our conclusion is that the three highest-performing sites benefited from having seven of the 10 top-scoring, “outlier” programs in their midst. As indicated in Chapter 5, the “outlier” local partners achieved their output through a combination of (a) operating within environmental situations that especially favor high efficiency and (b) deploying systems and methods that were appropriate for the situations in which they operated. Further examination and discussion of the ways in which they have achieved this result likely will produce insights that will be useful for the NAC as a whole in the future.

### **i. Conclusions from the Site-Level Analysis**

The analysis has highlighted the fact that the eight sites vary widely in terms of both the challenges they face, such as language diversity, and the positive factors that arise in their service areas, such as access to pools of volunteers and active networks of immigration organizations that can serve as partners. In three sites – Dallas, Houston, and Miami – the local partners and the sites as a whole have responded to generally favorable circumstances by deploying group processing and volunteers effectively, and have had good results.

In other sites, the environmental situations faced by the NAC were more mixed, with applicant populations that were highly diverse as well as geographically dispersed across vast areas lacking public transportation. In all sites and across the NAC, the ILRC has ensured that local partners and site leaders work together as learning organizations to

share what they are learning and to continually optimize their service delivery methods to improve efficiency without sacrificing service quality and effectiveness for their clients.

Better information based on further analysis of the circumstances favoring one delivery approach over another, and of the optimal size and configuration of group processing events – the so-called “sweet spot” – offering the most efficient service delivery to a specific applicant population in a particular community, could be helpful in the future as the NAC partners in each site continue to operate as learning communities to optimize their use of finite funding resources. Sites can use data-driven feedback from the NAC to assess the results of their efforts at maximizing the numbers of people who can be helped with finite resources.

In the meantime, further discussion of the findings of this study could opportunities for continued performance improvement. Questions that potentially could be explored in meetings among site partners and in future NAC national convenings could include the following:

- What best practices might arise through a closer look at how Dallas, Houston, and Miami have organized their collaborations?
- Similarly, what best practices might be identified through a closer look at the highest-performing local partners (outliers) across all the sites specifically serving highly language-diverse populations, to see if best practices can be gleaned out of their experience for efficiently serving diverse populations?
- How well is each site benefiting from the learning network that is the NAC and functioning as a learning organization? What is working, and what could be changed or added, to boost performance by all partners in the site?

## Chapter 7: Assessing Financial Performance at the *NATIONAL PARTNER* Level

### a. Overview

This chapter presents our findings at the national partner level of analysis. Questions include: How does the financial performance of the NAC local partners supported by each national partner compare with that of the NAC as a whole? What are the factors that might explain this variation, and what can we learn by examining the experience to date, through comparing and contrasting the ways in which the five national partners have applied their resources in the specific contexts faced by the set of local partners that each is supporting?

We compared the five national partners that provide funding to local affiliates in terms of naturalization applications per \$10K in funding produced by each of their local affiliates. One main observation emerged: that the correlation of efficiency with support from a particular national partner is weak. In other words, the differences within national partner affiliate groups are greater than the variation across groups. This is, in major part, because the affiliates of the most of the national partners are more or less randomly distributed across the eight sites with respect to the challenges posed by their service populations and geographic regions.

This study did not analyze the levels or types of support provided by each national partner, so we could not connect this to the efficiency of local partners. Conceivably a different picture could emerge from a further exploration of the impact of support by national partners on efficiency of NAC affiliates.

### b. Factors that Potentially Affect Performance at the National Partner Level

The subsequent discussion summarizes the following factors that potentially impact the efficiency of the local affiliates supported by the five national partners:

- **Opportunities:** Capacities of the national partners that favor efficiency
- **Challenges:** Environmental factors that hinder efficiency
- **Levers:** Variables within the control of the NAC that potentially can impact efficiency

#### 1) **Opportunities: Capacities of National Partners that Favor Efficiency**

- **National reach** through networks of local affiliates already serving immigrants in multiple cities in which the NAC is operating. All the national partners except one have national networks in place. This national partner provides sub-grants to a single NAC site, but its proximity to its local affiliates has enabled it to deliver strong support, and its affiliates' performance has matched those of the affiliates of other national partners.

- **Strong communications capacity in place** – for example, professional public relations staff unit in place and established relationships in place with broadcast and print media serving non-English speakers in NAC sites. All five national partners have this capacity.
- **Strong capacity in place for recruiting and supporting volunteers.** One national partner stands out in this regard.
- **Strong capacity in place for delivering training and support at local level.** All of the national partners are strong in this capacity.
- **Strong fundraising and resource development capacity in place.**

## 2) Challenges: Environmental Factors that Hinder Efficiency

- **Language diversity and/or cultural isolation** among the served constituency make outreach and/or service delivery more costly. All of the national partners' affiliates include organizations that serve difficult-to-reach populations as well as organizations serving more homogeneous populations. This mix among the affiliates supported by the national partners may be one of the key reasons that the national partners' affiliates largely cluster around the medians in terms of output per \$10K funding.
- **An immigrant constituency that is widely dispersed geographically,** making outreach and/or service delivery more costly. As with language and cultural diversity, this challenge is found among the local affiliates of all of the national partners, and is a likely cause of the lack of variation in the medians of national partners.
- **Lack of a pre-existing collaborative structure of local affiliates prior to the NAC** – requiring large investments in organizing and training before local partners reach steady-state levels of efficiency in producing events and producing naturalization applications. This was a factor mentioned in the Harder+Company interviews as a reality in most sites; the exceptions were Los Angeles and New York. Both of those sites were served by several of the national partners, so the impact of this variable was not evident in the national partner level analysis.

## 3) Levers: Variables within the Control of the NAC that Can Impact Efficiency

The following are factors that conceptually could explain some of the variation seen in the efficiency performance of NAC local partners but were not tracked in the reports and data we reviewed for this financial analysis. Potentially they could be explored through further analysis and discussion of the wide variation among local affiliates of the national partners.

- **Adequacy of resources provided to the local affiliates** – that is, the size of NAC re-grants in relation to the cost of delivering services to the specific target population and the challenges presented by the local context (for example, concentrated urban population versus dispersed rural population).

- **Kinds and amounts of support from the national partners**, such as training, technical support, and direct assistance to applicants provided to the site.
- **Leadership and coordination skills of the site leaders chosen by the NAC** in creating and encouraging teamwork among collaborating service providers.
- **Collaboration by national partners at the site level** that creates synergy by combining the capacities of two or more partners to address the specific challenges presented by a site.

**c. Conclusions From the National Partner-Level Analysis**

Our analysis of efficiency in production of applications and fee waivers at a national partner level reveals that each of the national partners is applying a unique mix of capabilities in support of its local affiliates. We found that the nature of the support that each national partner provides does not correlate strongly with efficiency; the efficiency of each national partner's affiliates varies greatly, and to a relatively similar degree, regardless of which national partner is analyzed. A different picture could emerge from a further exploration of the impact of support by national partners on efficiency of NAC affiliates, beyond the data set used in this analysis.



## Appendix A: Survey of Local Partners SurveyMonkey™ Instrument

### NAC Survey of Local Partners for Financial Analysis

PLEASE COMPLETE THIS QUESTIONNAIRE BY THE DEADLINE CONVEYED IN AN EMAIL FROM YOUR NAC SITE LEADER.

As a Local Partner in the New Americans Campaign, your organization is being asked to fill out this survey as part of the NAC's ongoing financial analysis of N-400 completion.

The NAC is sponsoring the analysis, which is being conducted with technical assistance by The Resource for Great Programs and with the cooperation of all the NAC's Local and National Partners, and Site Leaders in the eight cities.

Please respond to all questions by entering the requested information.

**IMPORTANT NOTE:** For convenience, this questionnaire is designed so you can complete the survey on multiple visits while preserving your answers, when using the same computer and Internet browser.

- In the browser, cookies **MUST** be enabled and not deleted when the browser is closed or computer shut down. Otherwise, Survey Monkey will not "remember" your computer and you will lose the data you have entered.
- If you exit the survey and wish to return, you must use the same computer and browser you were using in the previous session.
- To return, open the e-mail from your NAC site leader and click on the same link you used originally to enter the survey.
- When you have finished, simply click on "Done" on the last page of the survey.

HAVE QUESTIONS? For questions:

- About how best to answer a specific question, please contact your Site Leader.
- About the NAC's broader financial analysis of N-400 completion, contact: Sarah Letson, NAC Best Practices Manager, at [sletson@ilrc.org](mailto:sletson@ilrc.org) or 415-255-9499 ext. 538.

## NAC Survey of Local Partners for Financial Analysis

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- If you exit the survey and wish to return, you must use the same computer and browser you were using in the previous session.
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## A. YOUR ORGANIZATION and NAC PROJECT

### \* 1. Please provide the following information about your organization and local NAC Project.

Your Organization Name:

NAC Site (City):

Contact (Your) Name:

Your E-Mail:

Your Phone:

## B: PAID STAFF deployed by your NAC Project in Year 2 of the Campaign

IMPORTANT: Use professional judgment, augmented by whatever information is readily available, to provide your best estimate of these resources. We are looking for the best information that is available with a reasonable investment of effort on your part, not perfection. Thanks for your help!

### 2. LAWYERS - Staff

TOTAL FTEs - e.g., "2.5"

Total No. of Persons - e.g., "3"

### 3. BIA ACCREDITED REPRESENTATIVES - Staff

TOTAL FTEs - e.g., "2.5"

Total No. of Persons - e.g., "3"

### 4. MANAGEMENT/ADMINISTRATION - Staff

TOTAL FTEs - e.g., "2.5"

Total No. of Persons - e.g., "3"

### 5. OTHER STAFF - e.g., Translators, Intake Workers

TOTAL FTEs - e.g., "2.5"

Total No. of Persons - e.g., "3"

### 6. Estimated Breakdown of Staff FTEs by Activity (Each column should total 100%)

**IMPORTANT: Use professional judgment to provide your best estimate of how these resources are deployed overall. This is not required to be a precise measure.**

	LAWYERS	BIA ACCREDITED REPS	MGT/ADMIN STAFF	OTHER STAFF - e.g., Translators, Intake Staff
1. Admin. / Overhead (Management & Coordination)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2. Media / Outreach	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3. Policy / Advocacy	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4. Research	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5. Technology and Related Support	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6. Training / TA / Capacity- Bldg	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7. Volunteer Recruitment & Coordination	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
8. Direct services (i.e. application assistance)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## C: VOLUNTEER RESOURCES (IN 1ST QTR YEAR 3 ONLY)

### VOLUNTEER PERSON-HOURS

Deployed in the your NAC Project by your organization  
in the FIRST QUARTER OF YEAR 3 (July 1 through Sept. 30, 2013)

**IMPORTANT:** Use professional judgment, augmented by whatever information is readily available, to provide your best estimate of these resources. We are looking for the best information that is available with a reasonable investment of effort on your part, not perfection. Thanks!

### 7. LAWYERS - Estimated Volunteer Person-Hours

TOTAL PERSON-HOURS

### 8. BIA ACCREDITED REPS - Estimated Volunteer Person-Hours

TOTAL PERSON-HOURS

### 9. LANGUAGE VOLUNTEERS - Estimated Volunteer Person-Hours

TOTAL PERSON-HOURS

### 10. OTHER VOLUNTEERS - e.g., Event Workers

TOTAL PERSON-HOURS

### 11. Estimated breakdown of volunteer person-hours by activity (Each column should total 100%.)

**IMPORTANT:** Use professional judgment to provide your best estimate of how these resources are deployed overall. This is not required to be a precise measure.

	LAWYERS	BIA ACCREDITED REPS	LANGUAGE VOLUNTEERS	OTHER VOLUNTEERS
1. Admin. / Overhead (Management & Coordination)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2. Media/Outreach	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3. Policy/Advocacy	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4. Research	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5. Technology and Related Support	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6. Training/ TA/ Capacity-Bldg	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7. Volunteer Recruitment & Coordination	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
8. Direct services (i.e. application assistance)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## D: NON-NAC-FUNDED RESOURCES in YEAR 2

### NON-NAC-FUNDED RESOURCES

Deployed by your organization in the NAC Project

YEAR 2 (July 1, 2012 thru June 30, 2013)

### 12. GRANTS Other Than NAC deployed on activities of your NAC Project -

#### List SOURCES:

1st Grant	<input type="text"/>
2nd Grant	<input type="text"/>
3rd Grant	<input type="text"/>
4th Grant	<input type="text"/>

### 13. GRANTS Other Than NAC -AMOUNT of each grant

#### listed at left:

1st Grant	<input type="text"/>
2nd Grant	<input type="text"/>
3rd Grant	<input type="text"/>
4th Grant	<input type="text"/>

### 14. IN-KIND RESOURCES - List types deployed -

#### e.g., "Donated space for events."

1.	<input type="text"/>
2.	<input type="text"/>
3.	<input type="text"/>
4.	<input type="text"/>
5.	<input type="text"/>
6.	<input type="text"/>
7.	<input type="text"/>
8.	<input type="text"/>
9.	<input type="text"/>
10.	<input type="text"/>
11.	<input type="text"/>
12.	<input type="text"/>

**15. IN-KIND RESOURCES - AMOUNT-**

**Estimated dollar value of resource listed at left**

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	

## E: CHALLENGES

CHALLENGES faced by your NAC Project in Serving Your Applicant Population.

**16. LANGUAGE DIVERSITY - Please indicate the MAJOR LANGUAGE groups represented among applicants served by your NAC project.**

1.	<input type="text"/>
2.	<input type="text"/>
3.	<input type="text"/>
4.	<input type="text"/>
5.	<input type="text"/>
6.	<input type="text"/>
7.	<input type="text"/>
8.	<input type="text"/>

**17. PERCENTAGE of total applicants served by your NAC project whose primary language is that indicated in the question at left.**

1.	<input type="text"/>
2.	<input type="text"/>
3.	<input type="text"/>
4.	<input type="text"/>
5.	<input type="text"/>
6.	<input type="text"/>
7.	<input type="text"/>
8.	<input type="text"/>



**18. OTHER CHALLENGES** posed by your service population. Please describe in the box below any other **MAJOR** challenges your project faces in efficiently assisting applicants with their N-400 applications, such as geographically isolated population making outreach especially difficult, etc.

A large, empty rectangular text input box with a vertical scrollbar on the right side. The box is light gray and occupies most of the upper half of the page.

## Thank You!

Thank you for participating in this NAC survey for the financial analysis of N-400 completion.

**19. COMMENTS or CLARIFYING INFORMATION - Use the space below to enter any additional information that might help us better understand your responses. THANKS AGAIN!**

