

Memorandum



CITY OF DALLAS

DATE December 6, 2024

TO Honorable Chair and Members of the Workforce, Education, and Equity Committee

SUBJECT **Contract Status Update on the Benefits Navigation Project with Benefits Data Trust**

This memo provides an update on the Benefits Navigation project partnership with Benefits Data Trust.

On April 12, 2023, City Council authorized a one-year service contract with a one-year renewal with Benefits Data Trust to develop and design a benefits navigation program implementation plan. The project was established to be administered in 2 phases, with Phase 1 focused on research, landscape analysis, and partner engagement.

Background

On September 6, 2024, the City issued a Termination Letter to Benefits Data Trust related to the benefits navigation contract. This Termination Letter was issued in response to a notification from the organization of their planned closure. While initially advised of this closure in late June, the organization had spent time exploring potential mergers and other solutions to avoid closure. In the meantime, OCCE staff worked to ensure that all deliverables and materials were received.

The timing of the closure roughly aligns with the end of Phase 1 of programming. In order to properly close the project, staff met with the organization several times, as well as with various subcontractors that completed various project components. Staff collected all required reports and supporting data, as well as other critical information to ensure that the information learned through the project would be accessible and usable to the City for future program design.

This work was completed in collaboration with Child Poverty Action Lab, along with consultants and contractors including Steady State Impact Strategies, Third Horizon Strategies, and Advocatia Solutions. A summary report of the work demonstrates that an estimated \$410M in public benefits were left unclaimed annually in Dallas. Insight from participant interviews shows inconsistent experiences across different programs, with WIC being considered relatively easy to access compared with SNAP and Medicaid. Lack of communication and clarity related to application status, rules and denials, combined with long wait times and household barriers, like transportation, documentation difficulties and difficulty finding employment in alignment with SNAP workforce requirements, also contribute to difficulties in access benefits for clients. The report further recommends in person assistance from trusted sources, utilization of AI to speed up document review, and clarity around rules and program requirements.

A gap analysis report showed varied support in benefits access for residents in need, highlighting available navigation for health and nutrition benefits, insufficient support for utility benefits and scarce support for other benefits. The report summarizes the local benefits access landscape as reactive rather than proactive, with insufficient follow up and a lack of streamlined services. The report also notes the current state of service is mostly in person application support, with few organizations offering troubleshooting services and staffing limitations across organizations leading to incomplete assistance.

Additionally, a report of insights gleaned from health care organizations highlights significant health and well-being challenges for Dallas residents, particularly lower income residents. The report highlights that screening and some resource navigation tends to be available in healthcare settings, but is incomplete, and recommends centralized (or virtually federated) resources to better connect residents with public benefits.

The below is a summary of the deliverables received.

Phase 1 Deliverables: (All Completed)

1. Updated benefits crosswalk
2. Benefits Access Gap Analysis
3. Report that summarizes its research and provides preliminary recommendations on key partners with whom to engage on pilots/proofs of concepts, prioritized populations, pilot design concepts, and metrics to track impact

Phase 1 Performance Measures: (Met or exceeded)

1. 20 potential partners identified (exceeded goal of 10)
2. 52 interviews held (exceeded goal of 40)
 - a. BDT Client Interview Report
3. 2 user experience workshops held (Met goal of 2)

Additional Deliverable (Phase 2 Deliverable completed early during Phase 1)

1. 1 pilot program partially completed serving 156 Dallas ISD students served through telephonic-benefits navigation and application support pilot – this was to be part of 4 pilots planned for Phase 2 that would have collectively informed the final

Follow Up

Since the termination of the agreement, staff has had conversations with several entities engaged or interested in the work. Additionally, OCCE staff is coordinating with City Manager's Office and Budget Management Services (BMS) to develop recommendations for reallocation of unspent funding tied to this contract as a part of a future briefing by BMS.

DATE December 6, 2024
SUBJECT **Contract Status Update on the Benefits Navigation Project with
Benefits Data Trust**
PAGE **3 of 3**

Though the City is disappointed by the closure of the organization, staff believes that we have received valuable information and data. The department's intention is to bring forward a recommendation on how to advance benefits navigation work in the coming months.

Should you have any questions or need any additional information, please contact myself or Jessica Galleshaw, Director of Office of Community Care, at 214-670-5113 or Jessica.Galleshaw@dallas.gov.



M. Elizabeth (Liz) Cedillo-Pereira
Assistant City Manager

c: Kimberly Bizzor Tolbert, Interim City Manager (I)
Tammy Palomino, City Attorney
Mark Swann, City Auditor
Billierae Johnson, City Secretary
Preston Robinson, Administrative Judge
Dominique Artis, Chief of Public Safety (I)
Dev Rastogi, Assistant City Manager

Alina Ciocan, Assistant City Manager
Donzell Gipson, Assistant City Manager (I)
Robin Bentley, Assistant City Manager (I)
Jack Ireland, Chief Financial Officer
Elizabeth Saab, Chief of Strategy, Engagement, and Alignment (I)
Directors and Assistant Directors