



Collective Impact and Shared Success

How the Social Security education project has amplified the voices of diverse American communities in public debate



NATIONAL
ACADEMY
OF SOCIAL
INSURANCE



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THE AWARDEES



Alliance for Retired Americans Educational Fund *American Stories: The Voices and People of Social Security*

The Arc of North Carolina *We are part of America's promise: Individuals with intellectual and developmental disabilities raise their voice in support of a strong Social Security*

Athens Community Council on Aging *Voices from the South: How Social Security Affects Rural Populations*

California Alliance for Retired Americans Education Fund *Social Security & Persons with Disabilities: Campaign for California*

Center for Economic and Policy Research *The Need for Social Security by Location and Demographic Group; Congressional Social Security Accuracy Campaign*

Center for Economic and Policy Research and Direct Care Alliance *Retirement Security for Direct Care Workers*

Center for Rural Strategies *Social Security in Rural America: Bringing Rural Constituents and Messages into Public Policy Discourse*

Consortium for Citizens with Disabilities *Social Security and People with Disabilities: Public Education and Outreach Campaign*

Economic Opportunity Institute *A Comprehensive and Replicable State-based Strategy to Promote and Strengthen Social Security*

Empowered Queens United in Action and Leadership (EQUAL) *Organizing to Defend and Improve Social Security*

Economic Policy Institute *Our Shared Future: A Youth Movement to Strengthen Social Security*

Frances Perkins Center *Celebrating Social Security—in Our Own Words!*

Generations United *The Stake of Children, Youth and Grandfamilies in Social Security*

Global Policy Solutions and Insight Center for Community Economic Development *Mobilizing Experts of Color to Educate Communities of Color*

Health & Disability Advocates *Social Security = Family Security*

Institute for Women's Policy Research *Educating and Mobilizing the Women's Community to Safeguard Social Security*

International Association for Indigenous Aging *Leverage Model for Indian Elder Advocacy: Giving Elders a Voice on the National Stage*

Latinos for a Secure Retirement *Engaging Latinos in the National Discussion on Social Security*

National Council of La Raza *Engaging Hispanics in the Social Security Reform Debate and Sharing Their Views with Policymakers; Engaging Second-Generation Young Latinos as Advocates for Social Security*

National Council of Negro Women *African-American Women and the Future of Social Security: Increasing Knowledge, Framing the Discussion*

National Urban League *Improving Lives of African Americans through Social Security*

National Women's Law Center *Strengthening Social Security for Women*

OWL – The Voice of Midlife and Older Women *Social Security Matters*

Roosevelt Institute Campus Network *Think 2040: Strengthening Social Security State by State*

Southeast Asia Resource Action Center, Services & Advocacy for GLBT Elders (SAGE), and National Hispanic Council on Aging *Social Security Community Education & Local Engagement for Vulnerable Constituencies*

USAction Education Fund *Improving Lives of Vulnerable Americans Through Social Security*

INTRODUCTION

The National Academy of Social Insurance (NASI) is founded on the belief that the institutions of social insurance—such as Social Security—are innovative and effective tools to improve the lives of all Americans, including low-income and economically vulnerable workers and their families. We also believe that policymakers need to hear from everyone who has a stake in Social Security.

With support from the Ford Foundation, NASI awarded three rounds of contracts to community organizations with the goal of empowering groups most reliant on Social Security—such as communities of color, women, people with disabilities, low-wage workers, youth, and rural residents—to make their voices heard in Social Security policy debates. The project has focused on the world “beyond the Beltway,” sharing essential knowledge about ways to ensure long-term economic security for vulnerable communities, and in so doing has helped to begin shifting the Social Security policy debate away from a one-sided emphasis on benefit cuts to strategies that encompass improving the adequacy of benefits for low-income workers and families and increasing revenues to strengthen the program for present and future generations of Americans.

This unique Social Security education project has proven to be a successful model for engaging and educating key constituencies on issues that affect them and empowering them to have their voices heard in the public debate.

THE POLICY ENVIRONMENT

Social Security is the foundation of long-term financial security for American workers and families. It is the most reliable source of income in retirement and when families experience unforeseen risks such as career-ending disabilities, or the death of a breadwinning parent. Social Security is even more important today as workers see their personal savings shrink and as employers cut back on pension promises. Yet many individuals and families are financially insecure even with Social Security. This project works to enhance economic security for all American workers by empowering those most reliant on Social Security to make their voices heard in policy debates.

Among policymakers, discussion about the future of Social Security focuses primarily on program financing, often framing the issue exclusively in terms of solvency and budget deficits unrelated to Social Security. Largely missing from the public debate on the program’s cost is recognition of its benefits. Social Security is the most important asset that low- and middle-income Americans have. In good times and hard times—and especially during periods of economic uncertainty—Social Security’s reliable benefits provide peace of mind to millions of Americans who are not only vulnerable but often unnoticed and unheard by policymakers: a retired couple without other assets; a grandmother who cares for her grandchildren while her son and daughter-in-law are at work, trying to make ends meet; a 55-year-old meatpacker disabled by severe arthritis; or a 5th grader who became entitled to survivor benefits after her soldier father died in Afghanistan.

In order for the debate about Social Security to be balanced, it is essential that citizens understand the critical role of the program as a bulwark against economic insecurity *for all Americans*. Social Security is often the only source of income in old age or in the event of misfortune for low-paid workers, women, communities of color, widows, children, and individuals unable to work because of health conditions. These vulnerable groups have the most at stake in the debate about Social Security’s future, and this project enabled such groups to articulate and communicate their stake in Social Security by funding grassroots

outreach and education initiatives that create and disseminate user-friendly, research-based information targeted for use by these constituencies.

The resilience of Social Security owes much to the fact that public support exists not only to preserve the program but to modernize and enhance it for future beneficiaries. Through this project, more organizations have become equipped to confront misinformation about Social Security and to take the next step toward positive change: shifting the national conversation from cutting benefits to considering responsible and affordable ways to pay for benefit improvements.

ABOUT THE PROJECT



NASI seeks to ensure that timely, trustworthy information about Social Security is available and disseminated to those who need it—policymakers, advocates, the media, and the general public. One of the keys to NASI’s success is its bipartisan, multidisciplinary membership of over 900 social insurance experts. Members are leaders in their universities, businesses, unions, advocacy organizations, and communities around the nation. This wide range of perspectives has reinforced NASI’s long-established reputation among policymakers, journalists, and educators as a source of accurate, objective, and insightful information.



The combination of NASI’s member network of experts and our reputation for producing quality information on Social Security made NASI a natural fit for leading this project. The project advisory committee, which reviewed and selected the funded projects, was composed of NASI members. Selected projects came from organizations representing diverse constituencies—communities of color, women, children and youth, people with disabilities, rural communities, and low-wage workers—and proposed products were as varied as a research brief on Social Security for direct care workers and a YouTube video reflecting the experience of a woman receiving Social Security disability benefits. NASI wanted the selected awardees to broaden the Social Security debate by informing and empowering those with the most at stake.



The first of these projects began in September 2009, and the last concluded in April 2012. The selected awardees are organizations that either have a strong constituent base among vulnerable groups or conduct

work dedicated to serving such groups. The selection criteria were the same for all three rounds: reach of organization; potential to enhance understanding of Social Security among vulnerable groups; usefulness of proposed deliverables, such as pamphlets, YouTube videos, and PowerPoint presentations; quality of application; organizational capacity; and budget.

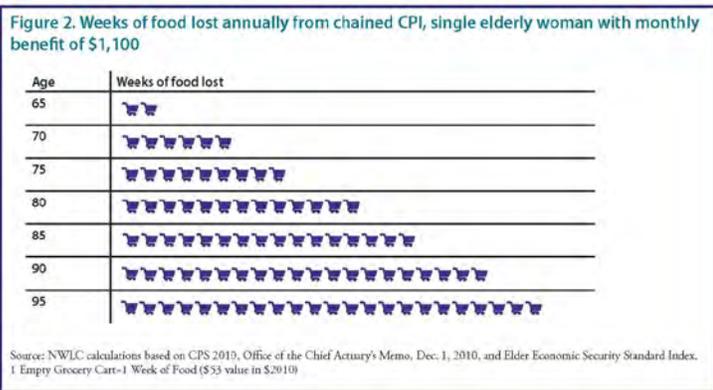
By the conclusion of the final round of funding, NASI’s awardees had held over 130 local events with over 11,000 attendees; hosted ten webinars with nearly 3,000 registered participants; organized 72 trainings where 2,500 people from vulnerable communities learned how to educate their communities about Social Security; garnered nearly 100,000 views (and counting) on YouTube; wrote 235 blog posts; placed nearly 650 articles, op-eds, and letters to the editor in local and national newspapers; collected 2,187 personal stories about the impact of Social Security on people’s lives; produced 80 publications (fact sheets, briefs, and reports); and built or strengthened relationships with nearly 300 other organizations.

IMPACT

NASI's awardees represent a wide range of constituencies and expertise, which worked together to generate far-reaching impacts. Some awardees focused on further research that better documented the issue of Social Security and vulnerable populations. Others built on this research foundation to empower their constituencies to advocate for themselves and their communities on Social Security. As a result, the full slate of awardee organizations reinforced public support—*informed* support—for Social Security and generated fresh momentum for strengthening the program and improving benefits.

Documenting the Problem: How Social Security Affects Vulnerable Groups

NASI and its awardees have built, and continue to improve upon, the solid research foundation needed to enable advocacy organizations and community organizing groups to produce their own Social Security agendas. With NASI as an objective resource, these organizations have produced and disseminated action-oriented reports on how Social Security impacts vulnerable populations such as women, youth, rural populations, people of color, and low-wage workers.



Fact sheets on Social Security and people with disabilities published by the **Consortium for Citizens with Disabilities** proved useful to other awardees, such as **The Arc of North Carolina**, that work with the disability community. The **Institute for Women's Policy Research** and the **National Women's Law Center** produced fact sheets and briefs focusing on how important Social Security is for women's economic security across races, ethnicities, and geographic regions, which were used by other awardees at events and in educational trainings.

For its project, the **Economic Policy Institute** produced a textbook, *A Young Person's Guide to Social Security*, written by young authors for young people. The goal is to educate young people about why Social Security is important for them, not only as future retirees but also as young workers. The textbook is written in a conversational style that young people can relate to, and explores the underlying philosophy of social insurance, the fundamentals of Social Security, its finances, and the debate about its future, confronting head-on the myths and misinformation surrounding Social Security. The textbook aims to support constituency-building and information-sharing among young workers and student populations about the benefits of Social Security.

The **Commission to Modernize Social Security**, a group of experts of color whose collaboration was supported by a contract through NASI's Social Security education project, produced *Plan for a New Future: The Impact of Social Security Reform for People of Color*, a set of recommendations to improve benefits and a plan to pay for those increases, which built on research from NASI's report, *Fixing Social Security: Adequate Benefits, Adequate Financing*, and incorporated findings from other awardees. The Commission's report not only amplifies the voices of communities of color in the policy debate, it also presents a way to strengthen Social Security by improving aspects of the program to reflect a changing workforce, increasing benefits for those most vulnerable, expanding access to benefits for those workers left out of



the system, and maintaining the system's solvency with a plan to pay for the improvements as well as promised benefits.

Advocacy: Empowering People to Make their Voices Heard

As a result of more research and information about how Social Security affects a variety of communities, diverse constituencies are increasingly joining the national conversation about Social Security, advocating for themselves and their communities. Child advocacy groups, direct care workers, women's organizations, the disability community, Native American advocacy groups, groups representing people of color, youth organizations, and other communities have recognized a shared goal in preserving and strengthening Social Security. Encouraging them to work together has deepened and diversified education and engagement efforts on the ground and in public forums across the country. The result has been an increased understanding about the importance of Social Security in Americans' lives among policymakers, the public, and the media.

For instance, a partnership between the **Center for Economic and Policy Research (CEPR)** and the **Direct Care Alliance (DCA)** showed how a research organization and an advocacy group can effectively collaborate for greater awareness of a specific issue—in this case, the stake of direct care workers in Social Security reform debates. CEPR produced estimates of direct care workers' participation in employer retirement plans using a new Current Population Survey (CPS) extract that CEPR developed. These are the first such estimates that have been produced on direct care workers' retirement benefit participation. These estimates show that only about one in four direct care workers participate in a retirement plan. DCA incorporated this data and research from CEPR's brief, "Maintaining and Improving Social Security for Direct Care Workers," into the public policy curriculum of DCA's annual Voices Institute, a national training program that brings together direct care workers from across the country to learn about the issues facing them and how, at a local and state level, workers can affect national policy on the long-term care industry. As a result, the 30 leaders from across the country gained information on Social Security that they then took back to their local communities and incorporated into their organizing. Social Security is a critical issue for direct care workers, especially as they continue to organize for greater access to benefits, and this project served as a key step in ensuring that direct care workers can participate in the public debate about Social Security.

The **National Council of La Raza (NCLR)** focused its education efforts on Latino youth, packaging information about Social Security in an interactive online "video quiz" to reach second-generation young Latinos.



The video quiz, which was promoted on the popular Mexican Word of the Day Facebook page, received thousands of hits on YouTube. But the real success of the video quiz is how it can be readily incorporated in school curricula and training programs. For example, Teachers College at Columbia University plans to include the video quiz as one of its approved lessons in its upcoming release of a new curriculum about the budget. NCLR's project enhanced young Latinos' understanding of the benefits of Social Security and explained how to advocate for access on behalf of their parents—and in so doing helped create a new generation of young Latinos who are informed advocates.

The **National Urban League Policy Institute (NULPI)** capitalized on the popularity of its "I Am Empowered" website to engage African American youth and young professionals on Social Security with an online quiz. NULPI also created an accompanying educational brochure to distribute to the National Urban League's more than 100 local affiliates. The brochure proved so useful and popular that the National Urban League had to print additional copies for its annual conference, which brings together over 10,000 attendees and features special programming for young leaders.

Also focusing on Social Security's relevance to young people, the **Roosevelt Institute Campus Network** worked to empower college students and young professionals to make their voices heard in policy debates. The cornerstone of the Campus Network's work is the *Think 2040* curriculum, which outlines the major challenges facing the country over the next 30 years, including strengthening Social Security and other social insurance programs, and encourages participants to think of innovative solutions. After participating in the Think 2040 Curriculum, students in North Carolina saw Social Security as a crucial buttress against being disadvantaged by economic and geographic change in the South. Through its Campus Network, the Roosevelt Institute is energizing thousands of students on campuses throughout the United States to put a strong Social Security system on their agenda for the future.

The **Athens Community Council on Aging (ACCA)** and **Empowered Queens United in Action and Leadership (EQUAL)** both focused on empowering their local communities—Athens, Georgia, and Queens, New York, respectively—by filling critical information gaps.

In response to a lack of awareness in the community regarding how to contact elected officials, ACCA developed an information packet, *Your Guide to Social Security Policy and Policymaking*. The packet was well-received as a resource in enabling individuals to advocate for themselves and contained helpful resources such as “How a Bill becomes a Law,” photos and contact information for local and state legislators, and a how-to guide to writing effective letters to elected representatives. Topics such as “Quick Facts of Social Security” as well as ten “Tips to Effective Advocacy” were also included to help people feel comfortable about voicing their opinion on key issues. ACCA had planned to hold three advocacy trainings throughout the project, but in response to high interest from the community, they held 11 trainings with 120 attendees from the Athens-Clarke County, Georgia area.

EQUAL is a broad-based, multi-racial, nonpartisan grassroots organization made up of ten congregations located in predominantly African American and West Indian South East Queens, and multi-racial Northern Queens. To educate their congregations about Social Security, EQUAL hosted a large assembly in July 2011, Social Security experts presented to 250 of EQUAL's congregational leaders on Social Security and its future. With other discussions and trainings, several leaders were able to start educating their congregations and discussing how they can get more involved in voicing their support for the program. Indeed, one of the most significant contributions of this project has been the development of new leaders. Twenty-four new and veteran leaders developed skills through conducting 191 individual meetings, 27 group meetings, and seven trainings during the course of the project. EQUAL was particularly instrumental in helping Metro IAF, a partner organization, inform Senators Charles Schumer and Kirsten Gillibrand about the negative consequences of switching Social Security's Cost-of-Living Adjustment (COLA) to one based on the “chained” Consumer Price Index (CPI).

For the **Alliance for Retired Americans**, this project proved to be a successful capacity-building experiment, as well as an impactful educational effort in key states. ARA aimed to take a core issue — Social Security —and use its resources to reach out to communities that might not know about the Alliance's work. This provided an opportunity for the state alliances to build relationships with other organizations and constituency groups working in their regions. Representatives from the **Missouri Alliance** noted that prior to the project, they were well-known in St. Louis, their main area, but not in other parts of the state such as Kansas City and Springfield. The project's resources allowed them to reach out beyond their base and develop relationships with other organizations. The **Washington Alliance**, on the other hand, focused its efforts on building relationships across generations. In particular, they invited college students to sit on panels with seniors and discuss the importance of Social Security to young people. The Washington Alliance saw a spike in the number of attendees at events during the course of the project. The number of participants at its trainings climbed from 20-30 initially to 150 as the project progressed, a sign that the

Washington Alliance strengthened its role as a go-to source on Social Security. The experience of the Alliance's state chapters showed that using resources to develop relationships with other organizations working in the same region translated into more effective advocacy: more voices at the table.

Also recognizing the power of local partners with national support, the **US Action Education Fund** (USAEF) built a new constituency of advocates for Social Security among jobless and underemployed workers and the financially distressed suffering in the economic downturn. USAEF developed a “train-the-trainer” educational curriculum to increase outreach to low-wage workers and develop leaders who can attest to the promise and benefits of Social Security. After developing this standard curriculum, USAEF provided small awards to partner organizations working at the state level to educate communities on the ground. Partner organizations conducted 26 trainings in five states (Idaho, Illinois, Maine, Michigan, and West Virginia), attracting 1,148 participants. In addition to training workers on the importance of Social Security, partner organizations also encouraged and facilitated those in local communities to make their voices heard through op-eds and letters to the editor. To date, USAEF partner organizations have facilitated the submission of nine op-eds and 33 letters to the editor.

The **National Council of Negro Women** (NCNW) focused its project on incorporating Social Security education into its annual programming, which reaches a network of nearly four million women worldwide. NCNW hosts a Policy Club network, comprised of 50 policy clubs around the country. Like book clubs, policy clubs bring groups of women together in their communities to discuss policy issues of relevance to their lives. NCNW's 50 policy clubs held four meetings to discuss timely news and information around the issue of Social Security, empowering attendees to become more informed and engaged on the issue. Additionally, NCNW made Social Security a key issue at the 25th annual Black Family Reunion, an event that draws tens of thousands of attendees to Washington, D.C., and serves as an ideal venue to disperse important information to grassroots community members. As part of this event, NCNW distributed fact sheets and other basic information on Social Security, and NCNW leadership spoke about the current threats to Social Security as well as the need to be engaged in the effort not only to preserve the program but also to work on behalf of improving benefits.

To empower the Native American elder community to participate in the public discussion on Social Security, the **International Association for Indigenous Aging** (IA²) embarked on an innovative “leverage model,” which lifted the voices of local elders to the national tribal leadership level. Instead of going through normal top-down political channels, IA² launched a successful model that sought support from state groups before presenting the resolution to tribal leaders. The approach minimized the need for individual advocacy—a culturally uncomfortable process for Native American elders—and leveraged individual voices by conducting community dialogue sessions with 350 elders at 17 Pueblo meal sites in New Mexico. Each session averaged 27 attendees, a level of attendance that IA² describes as extraordinary for Indian elder meetings, and the presenters were invited back at several of the sites, demonstrating the interest in and need for trusted information about Social Security and Native Americans.

In all, they recorded more than 450 of the elders' comments, which they then used to create a resolution reflecting these views. Their ultimate goal was to receive passage at the annual mid-year conference of the National Congress of American Indians (NCAI), the oldest, largest, and most representative American Indian and Alaska Native organization representing over 250 member tribes. This conference is a chance for tribal leaders to vote on resolutions that will establish the organization's position on issues relevant to Native people and tribal nations and the voice of NCAI is the collective voice of millions of American Indians and Alaska Natives. But to build enough support for this resolution before it was considered at the NCAI conference, IA² worked to secure local support. The IA² resolution has received unanimous support from the New Mexico Indian Council on Aging and the All Indian Pueblo Council, the governing body of New Mexico's 19 Indian Pueblos. The latter group agreed to submit it, under their auspices, to the nation's tribal

leaders at the NCAI conference. In June 2012, the resolution passed—unanimously—at the NCAI conference—an impressive accomplishment and a testimonial to the effectiveness of a patient, culturally sensitive initiative focusing on Social Security.

Building Public Will

With intense media focus on the future of Social Security, NASI’s awardees have been sought after by the media at the national level, as well as in local press outlets. Awardees have been cited by national media, including *The Washington Post*, *The New York Times*, NPR, and BET.com, as well as prominent online political media such as *The Huffington Post* and *Talking Points Memo*. Perhaps even more significantly, NASI awardees have received prominent coverage in local media, ensuring that vulnerable populations “beyond the beltway”—the groups that receive their information from local sources they trust—have access to reliable information on Social Security. Ranging from local newspapers to public radio and local television



news, NASI awardees received coverage in (for example) the *Alton Telegraph* (Alton, IL), Channel 13 (Springfield, MO), *Nashua Telegraph* (Nashua, NH), Maine Public Radio, *Montpelier Times Argus* (Montpelier, VT), and the *Toledo Blade* (Toledo, OH). In addition to local media coverage, awardees succeeded in placing 647 op-eds, letters to the editor, and articles supporting Social Security in local newspapers and wrote over 230 blog posts on the importance of the program.

One experience by the **New Hampshire Alliance for Retired Americans** exemplifies the local demand for credible information on Social Security. The NH Alliance hosted two forums which, despite having to cope with ice and snow, attracted some 100 participants to the state capitol and generated strong media coverage. The forums were covered by the *Nashua Telegraph*, *Concord Monitor*, and Channel 13-Nashua, and also led to a subsequent appearance to speak about Social Security on a one-hour NH Public Radio talk show.

In 2011, the **Center for Economic and Policy Research** (CEPR) launched the “Congressional Social Security Accuracy Campaign” project to inform policymakers, the press, and the general public whenever a prominent member of Congress makes an inaccurate statement about Social Security. Since its launch, CEPR’s campaign has had a significant impact on the debate over Social Security. From March 2011 through February 2012, CEPR sent well-publicized letters to 37 members of congress (some of whom have received more than one letter), as well as four Republican presidential candidates. CEPR’s letters have been cited in several major media, including *The New York Times*, and have been covered by local media such as the *Madison Capital Times*’ Madison.com website, the *Tampa Bay Tribune*, and the *Palm Beach Post*.

During the budget debates in 2011, the **Older Women’s Economic Security Task Force** (OWES) of the National Council of Women’s Organizations, chaired by the **Institute for Women’s Policy Research**, sent a letter to the President and Vice President asking the White House to include women in the male-dominated budget negotiations, which included discussion of cuts to Social Security. The letter was released at a press conference featuring several leaders of women’s organizations and received media coverage in high-profile media such as *The Washington Post*, *Roll Call*, *the Baltimore Sun*, and the *Huffington Post*. The letter and ensuing media coverage resulted in a high-level meeting between leaders of women’s organizations and Obama Administration officials, including Tina Tchen (Director of the White House Office of Public Engagement), Jack Lew (then-Director of the Office of Management and Budget, and now White House Chief of Staff), Bruce Reed (Chief of Staff to Vice President Biden), Stephanie Cutter (Deputy Senior Advisory to the President), Nancy-Ann DeParle (Deputy Chief of Staff for Policy), Danielle Gray (Associate Counsel to the President), and Avra Seigel (Deputy Director of the White House Office on Women and Girls). This and

other efforts by OWES served as a much-needed reminder at a crucial time, explaining the consequences of cutting programs like Social Security and how those cuts will affect women and families.

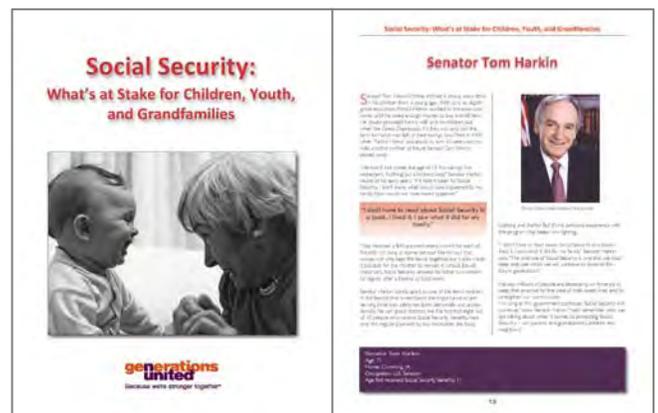
In recent months, OWES and other coalitions led by NASI awardees, such as the **Commission to Modernize Social Security** and **Latinos for a Secure Retirement**, have been working to develop their own sets of recommendations for improving benefits. Many national membership organizations and coalitions are beginning to take the position that it is time to be proactive on changing the conversation about Social Security, a significant shift among these key players from defending against proposed benefit cuts to discussing how to pay for improved benefits.

Political Momentum

In just two years, NASI and its awardees have made both qualitative and quantitative progress toward shifting the national conversation about cuts to Social Security and balancing the focus by including proposals to strengthen the program and improve benefits. The path of this progress underscores the viability of NASI’s model of unassailable research and creative partnering as the critically important basis for effective advocacy. The result has been a discernible shift among lawmakers to move beyond simply resisting cuts to introducing legislation that improves benefits and provides additional revenue to balance Social Security’s long-term finances.

Soon after its publication, *Plan for a New Future* from the **Commission to Modernize Social Security** received close attention from policymakers and staff on Capitol Hill. In a notable example, Representative Gwen Moore of Wisconsin asked her staff to contact members of the Commission and NASI staff to discuss how to incorporate elements of the Commission’s plan in legislation. Her staff found the plan inspiring, and discussions about drafting legislation to improve benefits, particularly for low-wage workers and women, are moving forward. Representative Moore is increasingly influential among the ranks of progressive members of Congress, and her active involvement is an indicator of broadening support for improving Social Security benefits.

Senator Tom Harkin of Iowa, who chairs the Senate Committee on Health, Education, Labor and Pensions (HELP), has become an increasingly prominent supporter of Social Security, prompted in part by **Generations United**, which has built relationships with policymakers whose families have had direct involvement with Social Security. In March 2011, Generations United released a profile publication, *Social Security: What’s at Stake for Children, Youth, and Grandfamilies*, which included stories on how members of Congress such as Representatives Jan Schakowsky of Illinois and Paul Ryan of Wisconsin and their families benefited from Social Security’s survivors insurance. Following the release of this profile publication, Senator Harkin’s staff contacted Generations United and expressed interest in working together to highlight the Senator’s personal story in a revised version of the publication. After the re-release of the publication, Senator Harkin became increasingly vocal about the importance of Social Security. In March 2012, he introduced the “Rebuild America Act,” a comprehensive bill that includes measures to improve the economy and to strengthen Social Security by increasing benefits for the millions of children, families, and older adults receiving survivor, disability, and retirement benefits, and by raising revenues to strengthen the program’s long-term finances.



Although Social Security is administered at the federal level, its impact is local. While awardee organizations with a national scope made significant progress in informing members of Congress and their staffs about the importance of Social Security, awardees with a local focus educated and engaged policymakers at the state and local level to strengthen grassroots support for the program. The **Alliance for Retired Americans** (ARA) awarded small sub-grants to a select number of chapters in targeted states to hold trainings, forums, and listening tours, as well as to engage vulnerable populations not typically among ARA’s constituencies. In Washington State, the mayor of Spokane attended one of the ARA’s local trainings about Social Security after hearing good reviews about the forum from a city council member. The mayor then asked the Washington ARA to hold another training for local business owners to help them learn more about Social Security.

Building on this progress in Washington State, the **Economic Opportunity Institute** used its project funds to produce resources used by Social Security Works Washington in its education efforts. The project focused on educating citizens and local policymakers, as well as Washington’s representatives in Congress. Most significantly, EOI received a letter of support for Social Security from Senator Patty Murray just before she was appointed to the “supercommittee” that was convened to address federal budget deficit issues. Senator Murray thanked Social Security Works Washington for its leadership and stated her commitment to “defend the integrity of Social Security against efforts to reduce its benefits or weaken its protection, to oppose efforts to reduce the federal deficit by failing to fully honor obligations to the Social Security Trust Fund, to advocate against raising the retirement age, and to support responsible efforts to strengthen and preserve Social Security benefits.” Senator Murray eloquently added: “For 75 years, Social Security has been America’s most trusted institution. Social Security represents the best of American values: rewarding work, honoring our parents, and caring for our neighbors.”



Focusing on areas of the country with a strong Latino population, **Latinos for a Secure Retirement** partnered with the **National Council of La Raza** to create a campaign entitled “Latinos and Social Security: ¡Tu Futuro Cuenta! [Your Future Counts!]” The campaign held five successful town halls across the country and many local elected officials attended, including the mayor of the City of Miami, the mayor of Perris (California), Boston city council members, a Massachusetts state representative, and Representative Judy Chu of California. Particularly impressive were remarks by the Republican mayor of Miami, Tomas Regalado, in which he shared his unequivocal support for protecting Social Security and his deep appreciation for the role it plays in the lives of his constituents. NCLR plans to keep building on the

initial connections made in Miami, since engagement with South Florida Republicans will be valuable as the debate on Social Security progresses in 2012 and 2013.

WHAT WE LEARNED

As described above, NASI’s awardees achieved significant success in a relatively short period of time. The funds from NASI allowed the awardee organizations to adapt their plans and capitalize on current events, such as the Bowles-Simpson commission deliberations, the ongoing budget and debt ceiling negotiations, and the “supercommittee” debates in 2011. By bringing together sometimes unlikely allies and embracing diversity in their collaboration, discovering the power of niche media, and leveraging the value of storytelling, NASI’s awardees found the most effective ways to reach and educate their target populations.

The Power of Embracing Diversity

Tapping into their varied constituencies and working together, NASI's awardees made important progress in confronting decades of misinformation about Social Security. By building out the network of awardees to include even more groups working with communities of color, women, youth, and low-wage workers, this project has generated new opportunities for collaboration by awardees using each other's products in educating their communities and holding joint events to leverage their resources for greater impact.

While the Hispanic, LGBTQ, and Southeast Asian American older adult communities face unique challenges in aging, one common factor is that they are heavily dependent on Social Security benefits in their retirement years, but have lacked a strong voice in the Social Security debate. **Southeast Asia Resource Action Center, National Hispanic Council on Aging, and Services and Advocacy for Gay, Lesbian, Bisexual and Transgender Elders** joined forces for a project aiming to educate diverse elder communities. The groups produced fact sheets and other materials in English, Spanish, Lao, Cambodian, Hmong, and Vietnamese. Each has built relationships with media outlets targeted to their constituencies and the three organizations have strengthened their relationship with each other around the issue of Social Security.

Proving that there is strength in numbers, **Global Policy Solutions** and the **Insight Center for Community Economic Development** came together to form a larger coalition of experts of color and experts from organizations representing people of color. This new **Commission to Modernize Social Security** included experts from other NASI awardee organizations, including the National Council of La Raza, the National Urban League, the Economic Policy Institute, the National Council of Negro Women, and the Institute for Women's Policy Research. In total, 13 of the 20 Commission members are from NASI awardee organizations. Drawing on the expertise and influence of each other's work and on NASI research, the Commission's report was a collaborative effort that has reached—and continues to reach—a broader audience than could have been achieved by the work of any one organization alone.

Generations United, dedicated to bridging the gap between older and younger Americans, worked to educate and engage two constituent groups that previously have had little direct involvement in discussions about strengthening Social Security: grandfamilies and advocates for children and youth. GU's work has been distinctly influential in raising awareness of Social Security as an intergenerational program. For example, Generations United worked with the Obama administration to include more information about Social Security's intergenerational value on the White House website and throughout its work. The Administration on Children and Families (ACF) recruited representatives from four other federal agencies to plan and convene an all-day meeting entitled "Intergenerational Approaches to Improving Outcomes for Vulnerable Populations." Generations United Executive Director Donna Butts was asked to work with the planning team to develop an agenda for the day that featured national experts showcasing innovative programs and outcomes based on research and evaluation. Fourteen federal departments and agencies were represented, including staff from the White House Council on Domestic Policy and the Senate Special Committee on Aging. A key issue that Butts stressed with the group was the importance of Social Security for all generations and the need for more people to discuss strengthening this intergenerational program. Butts also delivered the meeting's opening keynote and was later invited to give the same presentation to ACF's top management. The meeting resulted in creating an interagency coordinating group that is working to build on the day's recommendations.

This project also helped broaden and strengthen the partnerships of awardee organizations beyond their constituent base. The **California Alliance for Retired Americans** (CARA), for instance, used this project as an opportunity to build connections with the disability rights community. While basic support for Social Security is a shared value among these groups, few groups had prioritized Social Security as much as CARA.

Engaging disability advocacy groups at every level of planning, implementation, and evaluation eventually resulted in disability leaders and activists, and their organizations, viewing Social Security as a higher priority in their own work. Disability activists and organizations can now articulate their powerful personal stories about the key role that Social Security plays in enabling them and their families to live with dignity. As a direct result of this project, CARA now works with the disability community on other issues of common interest, extending the reach of both groups to different audiences.

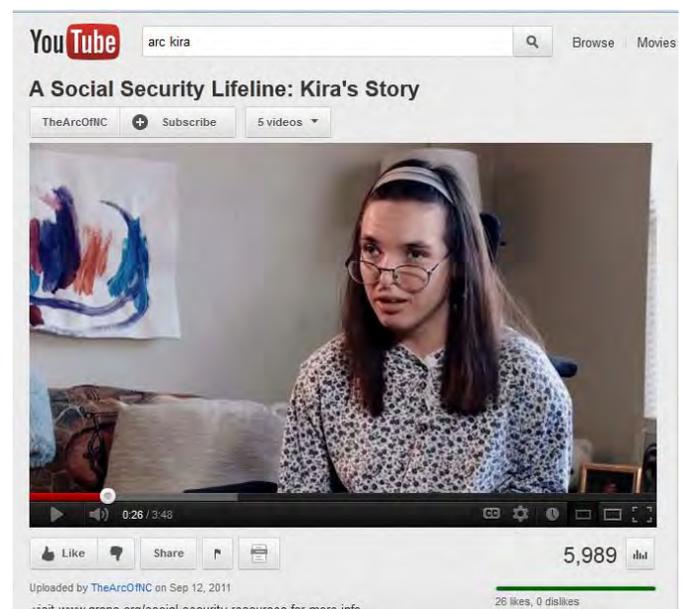
For other state chapters of the **Alliance for Retired Americans**, the project provided the opportunity to reach out to—and build trust with—vulnerable communities that might not be familiar with the work of the Alliance. The project inspired the national and state alliances to make a concerted effort to go outside their list of usual speakers to recruit new speakers for their events. As a result, the state chapters and the national ARA formed new relationships with a broader network of regional groups. Many chapters had never considered having child care or sign language at their events, and realized through this project how critical these accommodations are to ensuring that more people feel empowered to participate in Social Security discussions.

Child advocacy groups, direct care workers, women’s organizations, the disability community, Native American advocacy groups, groups representing people of color, youth organizations, and other communities have a shared goal in preserving and strengthening Social Security. Encouraging them to work together, and providing the resources to establish an effective partnership, has deepened education and engagement efforts on the ground and in policymaking forums across the country. The result has been an increased understanding about the importance of Social Security in Americans’ lives among policymakers, the media, and the American public.

The Impact of Niche Media: Social, Ethnic, and Local

Outreach to the media is a key component of any public education project. Ensuring that journalists understand the issues and have access to quality information has been a common goal among the awardees and NASI. Originally viewing media attention from the national, mainstream media as a key measure of success, NASI and its awardees soon found that communicating a positive message about Social Security to vulnerable communities requires focusing on the news sources they look to. Often, local and ethnic media outlets reach more of our intended audience than national media, and social media have increasingly become the preferred conduit for disseminating and receiving news. Through this project, awardees have explored these non-traditional outlets to great effect by reaching many Americans who are often left out of the loop of quality, trusted information on Social Security, and empowering them to join the conversation.

The Arc of North Carolina focused its project on empowering people with disabilities and their families to join the conversation about Social Security and share their own stories. The Arc decided to do this through a YouTube video focused on a day in the life of Kira, a woman in North Carolina living with a disability. It was important to The Arc of NC that the Kira video show not only a positive story of someone successfully living in the community, but equally important, a story that also highlighted the difficulties experienced by individuals with disabilities. Since its release, “A Social Security Lifeline: Kira’s Story” has been viewed thousands of



times and has generated many comments expressing gratitude for telling this story—such as: “Kira is remarkable and inspirational. Thanks to ARC [sic] for putting a human face on the current threat to SSDI and the Social Security safety net.”

People with disabilities often face challenges in making their voices heard in policy debates. For individuals with transportation barriers or other disability-related issues that make face-to-face interaction with lawmakers difficult or uncomfortable, telling their story through social media can increase their ability to advocate for themselves and make their voice heard despite the physical barriers to interpersonal interaction. After the release of the video, The Arc of NC realized how the YouTube video of Kira’s life is a great example of the power of one voice. Kira’s story was watched over 1,600 times in the first few weeks of its release. Responding to high demand, The Arc of NC offered a Video Advocacy how-to training to The Arc grant partners, students at the University of North Carolina, self-advocates and other interested community members. The Arc of NC reminded its audiences that they don’t need to be experts on Social Security or any other topic, they just need to be the expert of their own story and their own voice—a profoundly empowering message to the millions of Americans who rely on Social Security disability insurance and want to participate in the public conversation about the future of the program.

Just as The Arc of NC showed how social media can empower individuals to join the conversation, three awardees—the **Institute for Women’s Policy Research (IWPR)**, the **National Women’s Law Center (NWLC)**, and the **Older Women’s League (OWL)**—saw the realm of social media as an opportunity to bring the voices of millions of women to the policymaking table.

IWPR worked with the **National Council of Women’s Organizations (NCWO)** to launch a social media campaign, “Respect, Protect, Reject,” to encourage the nation’s political leaders to *respect* women’s need for economic security, *protect* programs that disproportionately serve and employ women, and *reject* any budget deal that threatens to undermine women’s economic security. The campaign was featured in an article in the print edition of *The Washington Post* and resulted in a meeting between House Minority Leader Nancy Pelosi and leaders of women’s organizations. In addition to the social media activities of the “Respect, Protect, Reject” campaign, NCWO sent a letter to the Congressional leadership, held a press conference, and created an individual petition that was signed by more than 4,000 people.

In honor of Mother’s Day 2011, the NWLC planned a Social Security-themed social media event. NWLC released its Social Security state fact sheets and encouraged its email subscribers to submit stories about how Social Security has impacted their lives. NWLC staff posted Mother’s Day blogs about what Social Security means to them and their families, encouraging women to participate. The message to subscribers was viewed by more than 7,600 people, and more than 100 stories were submitted. Building on this social media success, NWLC provided leadership to HERvotes, a new coalition of women’s organizations working to engage female voters, and helped draft a list of “Top 10” threatened programs for women, including Social Security. NWLC staff blogged about Social Security during the successful and widely read HERvotes blog carnival, with the message stressed on blogs hosted by the more than 50 coalition members and by *Ms.* magazine.



OWL built a Social Security educational campaign, called *Social Security Matters*, with social media at its center. By creating social media-friendly content, such as YouTube videos and blogs, OWL multiplied its reach beyond its already large membership base. Three YouTube videos garnered nearly 5,000 views, and many news outlets, including CBS Evening News, looked to OWL for human interest stories related to Social Security. OWL published over 20 blogs on *The Huffington Post* related to Social Security and received mainstream media attention in *Reuters*, *ABC News*, *The Washington Post*, *The New York Times*, and *Fox*, as

well as a segment on MSNBC, in which Keith Olbermann interviewed OWL's executive director. In addition to reaching tens of thousands of people through their action alerts and YouTube videos, OWL's work inspired other partner organizations such as Wider Opportunities for Women and Retirement USA to model their own advocacy materials after the effective OWL toolkit on *Social Security Matters*.

For **National Council of La Raza** and **Latinos for a Secure Retirement**, engaging Spanish language outlets throughout the country was key to educating and informing Hispanic communities. Their campaign was successful in generating a steady drumbeat of coverage from local and national Spanish-language media outlets to spread the information from the town hall events to their audiences across communities and the country. NCLR secured coverage from the "Big 5" among Spanish-language media — the four major newswires (Associated Press en Español, EFE, Notimex, and Impremedia) and the Univision television network—ensuring that millions of Latino consumers of Spanish-language media learned the facts about Social Security. NCLR generated particularly significant coverage from Spanish-language radio outlets in Miami, Philadelphia and Maryland. The largest Spanish-language print media outlet in the country, *La Opinion* in Los Angeles, ran a front page story covering the NCLR event, and an Associated Press story appeared in at least 200 Spanish-language newspapers across the country.

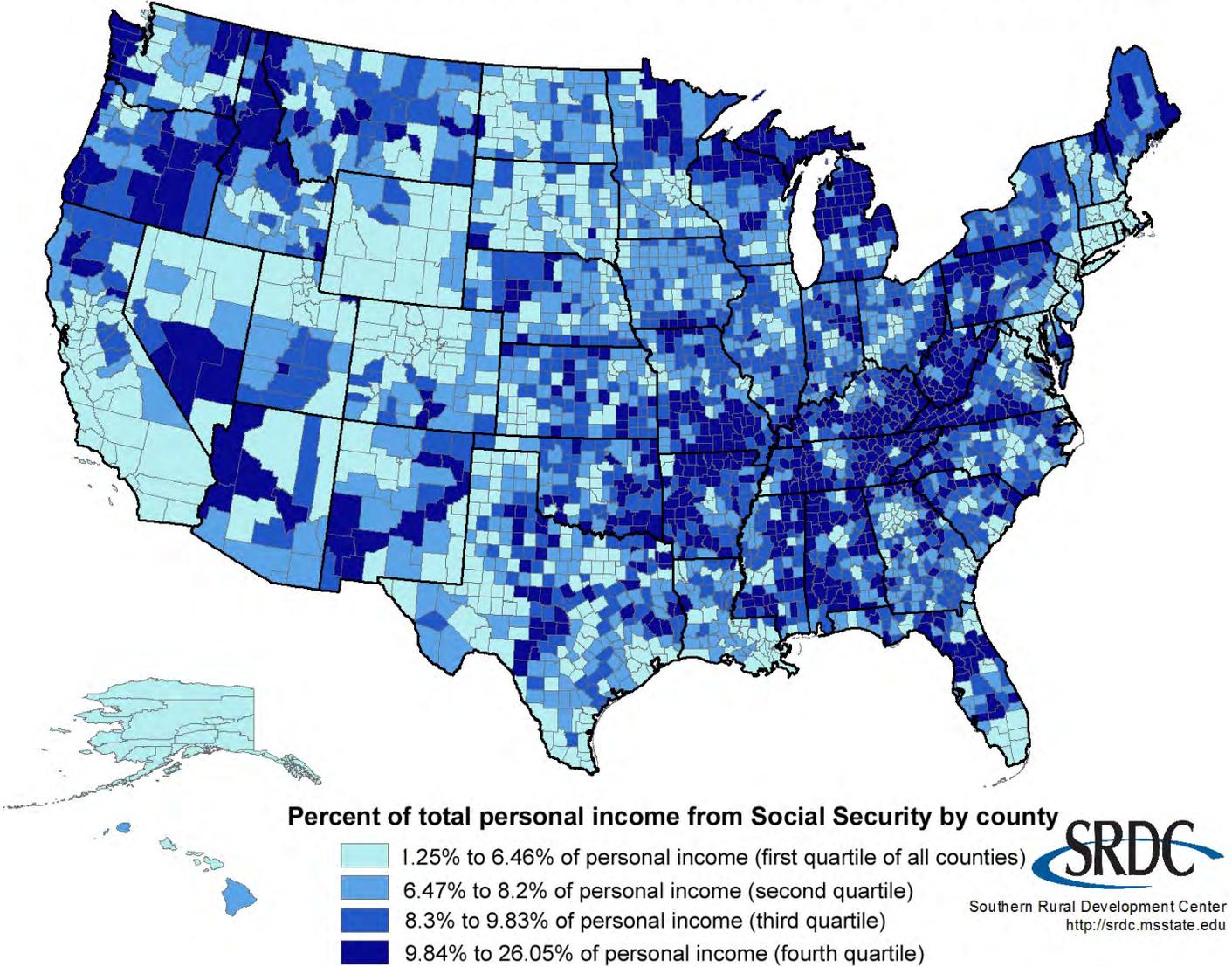
Recognizing that Social Security plays a central role in preventing and reducing poverty in rural communities, the **Center for Rural Strategies** partnered with the **Southern Rural Development Center** to prepare data tables on Social Security benefits on a county-by-county basis throughout the United States. Through maps and charts, the data allow researchers and policymakers to visualize how Social Security benefit payments affect local economies. Moreover, the Center for Rural Strategies embarked on an innovative plan to ensure that people living in rural communities had access to this information. Center staff prepared a template for a news article on how Social Security affects rural communities and customized the article to provide local data to rural media outlets. The response was immediate: articles have appeared in at least 589 news outlets in 34 states, reaching at least 1.4 million people.

Rural media outlets are often hungry for content, especially news that provides specific information about their area. Responses from editors and broadcasters have been overwhelmingly positive, confirming that accurate information about Social Security's impact at the county level is local news that editors and broadcasters are grateful to receive. Dozens of editors have contacted the Center to express their gratitude and ask for more information targeted to their local audiences.

Building on this media work, Rural Strategies partnered with the **League of Rural Voters** (LRV) to complement the reporting and dissemination project with media outreach, media training, and community organizing. LRV's role has been to use the publication of positive, local stories on the economic impact of Social Security to activate citizen participation and public policy debate. LRV has researched and written factual op-eds and letters highlighting the importance of Social Security to the rural economy and has launched a grassroots media-training program to develop the ability and confidence of individuals to engage in Social Security issue advocacy through letters, op-eds, and face-to-face contacts with community-based media.

Social Security and Local Economies

The percentage of total personal income coming from Social Security by county in 2009



Data: Social Security Administration and Bureau for Economic Analysis

The Value of Storytelling

As The Arc of NC discovered with its “Kira” video, showing the human face of public policy through storytelling can be of great value in turning an abstract policy discussion about Social Security’s finances into a tangible and deeply personal issue. Many awardees have gathered stories—or ‘story banks’—as part of their projects. To date, over 2,000 stories have been collected that show the importance of Social Security’s reliable benefits.



To show the human face of Social Security, the **Frances Perkins Center** collected and published over 40 stories of people of all ages whose lives have been touched by the program. The Center dedicated a section of its website, *The Social Security Stories Project*, to collecting these personal narratives of how Social Security has made a difference in people’s lives. The Center produced an eight-minute video of stories collected through the project. The **Institute for Women’s Policy Research** used stories from the Frances Perkins Center’s collection to add human faces to its scholarly report, *Retirement on the Edge: Women, Men, and Economic Insecurity After the Great Recession*. The Perkins Center published a book, *A Promise to All Generations: Stories & Essays About Social Security and Frances Perkins*, edited by Christopher Breiseth and Kirstin Downey, with essays by Nancy Altman, Jonathan Ball, Adam Cohen, Larry DeWitt, Kirsten Downey, Jamie Galbraith, Teresa Ghilarducci, June Hopkins, Eric Kingson, Donn Mitchell, Barack Obama, James Roosevelt, Jr., and others—many of them NASI members. Testifying to the appeal and value of personal stories, the project received coverage in *US News & World Report*, *The Hill*, and *The New York Times* online.

Generations United found that collecting and sharing stories is an increasingly vital part of its work on Social Security. Sharing on-the-ground stories about families who rely on Social Security generates greater media attention, interest on Capitol Hill, and re-posting by other advocacy organizations. GU’s profile publication, *Social Security: What’s at Stake for Children, Youth, and Grandfamilies*, includes an introduction on the intergenerational importance of Social Security and 13 compelling stories of the impact Social Security has had in protecting families. Larry Minnix, CEO of LeadingAge, described the publication as “an outstanding template for storytelling.” Stories from Senators Al Franken and Lindsey Graham and Representatives Paul Ryan and Jan Schakowsky appeared in the publication, which was released during a briefing on Capitol Hill in March 2011. In the case of Senator Franken, his participation in the profile publication was the first time he had spoken publicly about his personal experience with Social Security since taking office. As previously noted, Senator Tom Harkin came forward after the release of the publication and decided to share his personal story. Since then, Harkin has become a champion of improving Social Security benefits.

Health and Disability Advocates also sought to share stories of the familial impact of Social Security through its campaign, *Social Security is Family Security*. “My Brother Robert,” a video exploring the life of a person with disabilities and his family caregivers, was the debut feature of the *Family Security* project. The video focuses on siblings in suburban Illinois. The story of Robert, who has cerebral palsy, is told mostly from the viewpoint of his sister. Robert first moved in with her 25 years ago, when she was single and working at a fast food restaurant. Over the years, she started a family, returned to school, and became a

public health nurse for the Village of Mount Prospect. All throughout those years, Robert’s Social Security benefits made it possible for his sister to avoid placing him in an institution—instead keeping him living with her, as a cherished member of her family. His Social Security benefits also enabled his sister to pursue her own life goals and have contributed to the stability and continuity of their family life over the years.

CONCLUSION

NASI’s education project has demonstrated in myriad ways that investing in educating the public, especially vulnerable communities, about Social Security can yield significant results in the short run, especially with a dedicated and diverse group of organizations working together. In the long run, this project enabled many organizations to put down roots on this issue, building their capacity to educate their constituencies and communities and empowering new voices to contribute to the Social Security debate.

Inside the beltway, awardee-led coalitions such as the Commission to Modernize Social Security and the Older Women’s Economic Security Task Force continue to produce sound, credible proposals to improve the adequacy of benefits and pay for these improvements without benefit cuts. Members of Congress in both chambers are increasingly taking their cue from these proposals and introducing legislation to improve and pay for Social Security. This is a significant advancement from just a few years ago before this project began.

Outside the beltway, this project reached nearly all 50 states, empowering rural and urban communities, young people and retirees, and Latino communities in Kansas City and multi-racial communities in Queens. New voices from the child advocacy and direct care workers movements joined the discussion on Social Security and now include the program on their lists of policy priorities.

With Social Security covering almost all workers and touching the lives of nearly all Americans, the broad reach of this project reflects the nearly universal impact that Social Security has achieved in its 77 years — especially in aiding and protecting the most vulnerable Americans.

PROJECT ADVISORY COMMITTEE

NASI’s President, Janice Gregory, named an independent Advisory Committee of NASI member volunteers to advise NASI staff on its awarding of contracts. Members of this Project Advisory Committee were:

Nancy Altman, consultant | *Nancy Amidei*, Senior Lecturer at the University of Washington School of Social Work | *William Arnone*, Consultant, former partner in the human capital practice of Ernst & Young, LLP | *Howard Fluhr*, Chairman of The Segal Company | *Eric Kingson*, Professor of Social Work, Syracuse University | *Joni Lavery*, Social Science Research Analyst, Social Security Administration (SSA) | *Lisa Mensah*, Executive Director of the Initiative on Financial Security of the Aspen Institute | *Kathleen Romig*, Social Insurance Policy Analyst, SSA | *Walt Swanston*, former Director of Diversity Management for National Public Radio (NPR) | *Debra Whitman*, Staff Director, U.S. Senate Special Committee on Aging | *Cecili Thompson Williams*, Assistant Director of the Center for Human Rights and Humanitarian Law at American University’s Washington College of Law