



Final Narrative Report Guidelines

Narrative Report Preparation

Your final narrative report to the Foundation is an important record of what you are achieving and what you are learning in the process. Preparing this report allows you — and the Foundation — to analyze your work and the context in which it is being done. This analysis helps to inform future grantmaking directions.

The report should address the results of the project just completed. The Foundation does not expect the approved activities to unfold exactly as originally planned. Success is often achieved because a project made changes. The lessons learned in making changes or from not being able to attain certain goals are as important as the successful outcomes. We encourage you to share your successes and frustrations. Each report should build upon the last, containing just enough information from previous project year(s) to refresh the reader's mind and to describe the growth and progress of the project.

Please upload your narrative report using the web form link in the email used to deliver these guidelines at the time of final reporting.

Financial Report Preparation

An Excel financial report form is sent at the end of each reporting period for financial reporting. It contains specific instructions for its completion in the Excel worksheet pages (see both General Instructions & Instructions worksheets). Please review them carefully. Once completed, the financial report will be certified by the staff person identified as your organization's financial designee.

Report Submission:

- **Please submit only one version of your reports by uploading as directed in the web form linked** within the email used to deliver these guidelines during annual reporting. Do not send additional copies. **We strongly discourage separate email or fax** unless there is a reason you cannot access the upload feature in the web form. We prefer not to receive hard copies as our records are stored primarily in electronic files.
- Please send us DVDs, print reports, videos, books, booklets, documentaries, training guides, web links or other media that were produced expressly with Kellogg grant funds as a means to inform and educate the public about your project.

- Please do not send unrelated, general information or public relations materials about your organization as these materials will be discarded, due to limited storage space.

Narrative Report Preparation

The format below is suggested as a means of helping you provide information about your accomplishments and learning. Feel free to modify the format if needed as long as substantive points are covered in your project. Strive to be brief but complete.

Project Summary:

Use the goals below (as stated in your proposal) to provide a **brief summary** of the strategies you have undertaken to achieve the goals and the methods by which you are evaluating these efforts. Note if changes have been made to any goals.

The goals of this project are to:

- (1) expand work on economic justice with a keener focus on economic inequities, their racial connections, and the impact on vulnerable children, and
- (2) increase capacity to provide in-depth economic analysis to support citizen education, faith and community engagement, and advocacy. Specifically, Kellogg funding would enable JSRI to expand significantly with specialist staff the scope and depth of the poverty thrust of work to support strategies that increase income and assets of vulnerable children and their families and reduce disparities based on class, gender, and race.

With the Economic Justice for Vulnerable Children and Families project, JSRI succeeded in strengthening, focusing, and expanding our research, analyses, and educational efforts related to economic inequities in New Orleans, Louisiana, and Mississippi. These efforts include a specific focus on the connection between economic inequities and racial disparities and the resulting impact on vulnerable children and families. Through hiring an economic policy specialist who is charged specifically with conducting detailed analyses of issues related to economic justice for children and their families in Louisiana and Mississippi, JSRI has significantly increased capacity, enhanced outputs, and achieved measureable outcomes regarding improving economic justice.

Within the enhanced research and educational efforts that are part of the Economic Justice for Vulnerable Children and Families project, JSRI provided an array of specific policy recommendations for improving equity and eliminating disparities based on race and class. Because of our increased capacity to strategically develop and distribute economic and social analyses, JSRI was able to indirectly influence programmatic and policy outcomes in both Louisiana and Mississippi especially with policies relating to the expansion of Medicaid and anti-immigrant legislation.

For both states, JSRI developed and distributed detailed reports, educational materials, and presentations that shed light on economic injustices that disproportionately impact vulnerable children and families and the essential connection between economic disparities and race.

Most notably, in the final year of the grant period JSRI produced the inaugural *JustSouth Index*, a quantitative analysis of levels of social justice in the U.S. with a focus on poverty, racial disparity, and immigrant exclusion. Through ranking all states and focusing on the Gulf South states, JSRI was able to measure and highlight the true challenges faced by the persons living in poverty and who belong to racial and ethnic minority groups in Louisiana and Mississippi. The report was widely distributed to partner organizations, the media, and the public through a press conference, conference presentations, and direct mailing. Recommendations included in the [*JustSouth Index*](#) such as increasing minimum wage, increasing child care assistance, increasing access to health insurance, enhancing services for immigrants, and creating or strengthening state Earned Income Tax Credits all were discussed, to varying extents, by the media, advocates, and policymakers during the legislative sessions in both states. Due to the challenging political climate and budget constraints in Mississippi and Louisiana, the outcomes of the policy discussions were not always aligned with our research findings and policy recommendations. Through providing and presenting thorough research, however, we were able to shape discussions, increase the relevance and understanding of economic and racial justice issues, and enhance the advocacy efforts of partner organizations. These efforts represent groundwork laid for future positive changes in public opinion, policy adoption, and policy implementation.

Our outputs to achieve stated outcomes and goals include:

1) Structural budget analysis and alternatives that improve the conditions for children:

(a) Further state-specific analysis of the negative impact of payday lending that targets low-income families in Louisiana and support continuing community education and mobilization to decrease the vulnerability of income-limited families to payday lenders. Poor families then will have increased income for care and education of their children.

In Louisiana and Mississippi, JSRI supported efforts to combat harmful legislation to expand predatory lending. Through analyses of the bills; coordination of advocates; educating legislators; and producing materials including factsheets, infographics, and background materials for distribution to our partner organizations, we aided in the defeat of the bill in Louisiana. Ms. Donovan developed the three-page [*Factsheet: Predatory Lending in Louisiana*](#) for distribution to advocates in Louisiana to assist them in their efforts, for posting to the JSRI website, and for distribution through JSRI social media.

In Mississippi, we supported an effort by faith-based organizations in the state to encourage the Governor to veto a harmful predatory lending bill. Ms. Donovan provided information and analysis to the Catholic bishops in Mississippi, which they used to write a letter to the Governor in support of a veto, but ultimately the Governor chose to sign the bill. In future sessions, JSRI plans to continue and enhance our work to restrict predatory lending in Mississippi.

Ms. Donovan also has been active in supporting and circulating information regarding the federal regulations of payday lending through active participation in the national *Stop the Payday Loan Debt Trap* campaign. Upon the release of the regulations in June, JSRI issued a [statement](#) on June, 2, 2016 that we circulated to local and state media outlets and sent to the Louisiana congressional delegation stating the need to support and further strengthen the regulations. Subsequently, Ms. Donovan and Fr. Kammer appeared on the local New Orleans radio station, WWNO, and in multiple local news outlets [See: [Critics: Loopholes in Payday Lending Crackdown](#) in *New Orleans City Business*] discussing the importance of the proposed rules and the dangers of the payday lending industry. Ms. Donovan also had a guest column published in *The Advocate* titled [Feds Act to Curb Predatory Payday Loans](#) on July 8, 2016.

JSRI staff also coordinated efforts to drive public comments to the federal agency during the comment period. Commenters are encouraged to ask the Consumer Financial Protection Bureau to close loopholes and tighten the proposed regulations to ensure that the lenders are not able to continue to exploit borrowers.

Moving forward, JSRI plans to provide educational materials that will support efforts to enact state legislation to close loopholes left open by the CFPB regulations. Also, it will be critical to ensure that state legislatures do not enact policies that allow predatory lending products not covered by the CFPB regulations such as long-term installment loans.

(b) Share in-depth local and state tax analyses and civic education on the current tax structures in Louisiana and various “reform” plans and their impact on vulnerable children and families—including providing accessible research to encourage multi-sector leadership to reduce tax burdens on poor families, helping them to support and educate their children.

JSRI had an integral role in a major campaign to increase tax fairness in Mississippi led by the Catholic Charities Jackson Poverty Task Force. JSRI developed all advocacy and educational materials related to the campaign and both Fr. Kammer and Ms. Donovan had articles published in the *Mississippi Catholic* newspaper on January 8, 2016 regarding both the need for increased revenues in the state and the

current imbalance regarding the tax burden on low-income households in the state. On February 11th Fr. Kammer delivered the keynote address at the Mississippi Catholic Day at the Capitol regarding the principles of Catholic Social Teaching related to fair and adequate taxation and the need for reform in Mississippi. In the February edition of the *JustSouth Monthly* Fr. Kammer wrote [*Faith in Action: Mississippi Catholics and Child Well Being*](#) to describe efforts in the state to improve child well-being and mental health services through improved taxation.

JSRI has also taken on a new project related to economic security and economic opportunity for working Mississippians. Ms. Donovan is in the final stages of drafting the 2016 *State of Working Mississippi Report*, in collaboration with the Economic Policy Institute, Hope Policy Institute, and the Mississippi Center for Justice. The report is based on the national *State of Working America* report published by EPI and analyzes state level trends related to the job market, wages, labor force, and poverty. The report will be released along with recommendations in fall 2016.

Ms. Donovan also completed an analysis of the School Readiness Tax Credits in Louisiana and published an [article](#) with the findings in the Spring *JustSouth Quarterly*. She also developed educational materials and [infographics](#) related to the state Earned Income Tax Credit in Louisiana. She shared the resources related to both tax credits with legislators through in-person and written communications. In both instances, legislators on the committee, who were tasked with review all state tax credits for their value and economic returns, praised JSRI and other advocates for providing information about the impact of these relatively small, but critically important tax credits. As a result both credits were maintained following the comprehensive review of all tax credits completed by the Legislature. In fact, the committee chairman, Sen. J.P. Morrell was so impressed by the information shared related to the importance and impact of the state EITC that he filed a bill to increase the amount of the credit from 3.5% to 5% of the federal credit.

Ms. Donovan and Fr. Kammer also regularly participated in meetings of the *Together Louisiana* faith-based coalition, which selected tax fairness as its primary advocacy focus for the 2016 and 2017 legislative sessions. JSRI promoted the tax fairness campaign of *Together Louisiana* on its [website](#) and through its social media.

(c) In the area of health and wellness, provide fiscal analysis of Medicaid expansion and alternative health plans in Louisiana and their consequences for the wellbeing of low income families. Better health care for low income parents and their children means more secure families, more regular work, and less family spending for catastrophic and other care.

JSRI released a [one-page fact sheet and infographic](#) related to the benefits of the Medicaid expansion in Louisiana. This infographic was used in partnership with the

Micah Project, a faith-based community organization that coordinated grassroots advocacy for Medicaid expansion in Louisiana. Also, in the *JustSouth Index*, expansion of Medicaid was highlighted as one of the policy recommendations under the Poverty Dimension. By comparing rates of un-insurance and poverty levels among the poor in each state, we were able to show how in states where Medicaid expansion has been in place for a number of years, the poorest in society are faring better than in states like Louisiana and Mississippi where implementation has been delayed. Ms. Donovan was able to present those findings at the March 29, 2016 Louisiana Health Summit, which was attended by more than 200 advocates and at which the Governor spoke.

After the Louisiana Governor announced his decision to expand Medicaid in the state, several conservative legislators began discussing ways to impede or complicate the expansion. For example, several bills were filed that would have imposed premiums or copayment requirements on certain Medicaid beneficiaries. Ms. Donovan was able to share with health advocates in the state information about the bills and the dangers of such policies based on existing research from other state. All such bills were defeated in the Legislature after detailed and comprehensive testimony was delivered by a variety of healthcare advocates. JSRI views this as a major policy victory and will continue to monitor the implementation of the Medicaid expansion in Louisiana and educate advocates about bills that would create barriers to the program. A major goal of ours in the next year will be to build the case for Medicaid expansion in Mississippi. Another major goal health-related goal for the upcoming year will be to analyze the economic and social impacts of eliminating the five-year waiting period in the Medicaid program for immigrant youth and pregnant mothers.

In other JSRI health-related activities, Mr. Bustamante wrote in the July 2015 *JustSouth Monthly* about the [Bread or Stones](#) campaign of the Louisiana Interchurch Conference in which he and JSRI summer 2015 intern Stephen Pitts, SJ, were working, including the need to improve children's health status. JSRI sponsored a showing on September 2, 2015 of the documentary film *Big Charity* with a panel of specialists afterwards to discuss with the audience of students, faculty, and local citizens the realities of health care services in New Orleans before and after Katrina and the closing of Charity Hospital. In the September issue of the *JustSouth Monthly*, in an article entitled [Katrina and the Least among Us](#), Fr. Kammer discussed the state of healthcare in New Orleans before and after Katrina. Fr. Kammer published in the Winter 2015 edition *JustSouth Quarterly* an article celebrating the 50th anniversary of Medicaid entitled [Happy Birthday Medicaid](#) and indicating the continuing threats to the highly successful program. It was also posted to the JSRI website and sent out on JSRI social media.

2)) Provide economic data for community education and engagement:

(a) In the area of immigration, digest, analyze, and educate the public and the faith community on the economic push-pull factors in immigration and the costs/benefits of immigration to reduce anti-immigrant sentiment supporting policies putting immigrant families and children at risk and driving them into the shadows.

In the last year, JSRI hosted two faith-based community dialogues in Louisiana and one in Mississippi in which parishioners of churches of various denominations are invited to hear the stories of immigrants living in their communities, including their migration stories and their current living situation. The process was also presented on a webinar by Dr. Sue Weishar sponsored by Loyola's Institute for Ministry. In addition, Dr. Weishar:

- spoke on a panel on Human Rights on June 29, 2015 at the Annual Conference of the Louisiana Human Rights Commission at the Hyatt Regency Hotel in New Orleans;
- was the guest speaker on September 24, 2015 for the Louisiana Public Libraries Sites of Conscience on Immigration to Louisiana at the Old U.S. Mint;
- was interviewed by Catholic News Service, *Times Picayune*, WGNO, and WVUE about Syrian refugee resettlement in November 2015;
- was interviewed by *The Wall Street Journal* regarding the planned ICE raids in December 2015;
- organized a Katrina Homeowners Press Conference in front of Loyola University August 28, 2015 (ten years after Katrina), to thank immigrant workers for helping to rebuild New Orleans, which received good coverage in the *Clarion Herald*;
- helped organize a Rally to Welcome Syrian Refugees December 19, 2015, on the Riverwalk that was well covered by local media, especially nola.com; and
- is active board member of Seashore Mission/El Pueblo, a nonprofit that serves immigrants on the MS Gulf Coast.

JSRI also conducted research and analysis related to two pieces of anti-immigrant legislation in the Louisiana legislature. That information was distributed to partner organizations and advocates, and both pieces of legislation were defeated.

JSRI also included in the *JustSouth Index* three indicators related to immigrant integration, which compared performance of all states on the indicators and provided policy recommendations for improving the ability of immigrants to integrate and become healthy, thriving members of the community. At the *JustSouth Index* press conference on March 17, 2016, JSRI hosted a woman who is originally from Brazil to share her immigration story as well as the existing economic and

social challenges that she and her children face in Louisiana. Her story was covered in the local and state news outlets.

(b) Implement JustSouth Indicators Project on poverty, race, and migration in the five Gulf South states, starting with Louisiana and Mississippi, by January, 2015, specifically focusing on child poverty and family income.

As discussed at length in our March 2015 report to the Foundation, at a press conference on January 13, 2015, JSRI released its first “deliverable” in the indicators project—the special edition of its *JustSouth Quarterly* entitled [*Too Much for Too Many: What does it cost families to live in Louisiana?*](#) It was widely covered in local and state press and media.

On March 17, 2016, JSRI released the inaugural edition of the [*2016 JustSouth Index*](#) at a press conference on Loyola’s campus, which led to great publicity and distribution of the report’s findings. Fr. Kammer and Ms. Donovan presented the background and findings of the project with representatives of the local media. An attorney from Loyola’s Workplace Justice Project also spoke at the press event and shared information related to employment discrimination and wage theft that contributes to racial disparities in earnings. Two community members also spoke to members of the press to share their personal experiences with economic and racial injustice. Following the press conference, the stories about the report were circulated in newspapers across the country, including the *National Catholic Reporter*, *The Advocate*, *The Republic*, and *The Daily Progress*.

The project includes a 36-page hard copy report, including [individual report cards for the five Gulf South states](#) and [interactive website](#) that measures and ranks all the states on nine quantitative indicators related to social justice. The nine indicators fall within three dimensions – poverty, racial disparities, and immigrant exclusion. The detailed analyses and recommendations focus specifically on the findings and rankings of the Gulf South states, including Louisiana and Mississippi. Along with the findings of the quantitative analysis, the report includes concrete policy and program recommendations for improving the performance of the Gulf South states on each indicator and the overall index.

A hard copy of the report was mailed directly to JSRI’s mailing list of over 1,600 persons, who subsequently were invited to join JSRI’s VoterVoice listserve to receive action alerts to take action on the issues identified in the report. To date, nearly 400 persons have registered for the action network and JSRI staff have issued 10-12 strategic action alerts to the network. In the future, JSRI plans to strategically build its advocacy network through the VoterVoice tool, including outreach to students and faculty at Jesuit Universities in the Gulf South, faith-based advocates, and partner organizations.

3) Multi-sector outreach and alliance building:

(a) Provide economic analysis and educational materials to state interfaith/ecumenical leadership and congregations in Louisiana and Mississippi and strengthen the interfaith voice on payday, Medicaid, taxes, immigration, and other economic justice issues in the future.

In addition to providing the *JustSouth Index* and the *JustSouth Quarterly* publications to interfaith groups and congregations, JSRI actively supported the efforts interfaith/ecumenical leaders and organizations in both Louisiana and Mississippi. Our enhanced work with the Poverty Task Force of the Catholic Charities of Jackson, Together Louisiana, the Louisiana Life and Justice Committee, and the Louisiana Interchurch Conference over the past year, has allowed us to strengthen our ties with faith groups working to improve social justice through policy and advocacy.

JSRI also connects with faith leaders and congregation members through our direct mailing of the *JustSouth Quarterly* and emailing of the *JustSouth e-News*. Alumni of the JustFaith Ministries program in the Gulf South as well as many other faith leaders are members of our distribution list.

(b) Provide research and public education to support the Louisiana Interchurch Coalition [LIC] “Bread or Stones” campaign to move Louisiana out of 49th place in the Kids Count index.

JSRI continues to provide ongoing support to the “Bread or Stones” Campaign. JSRI staff developed the information brochure and video presentation to be used in various regions of the state for recruiting congregations and other member organizations to the campaign. The Bread or Stones campaign recently hired its first campaign coordinator, with whom JSRI will work closely to develop additional materials as needed. We also will work with the new coordinator to plan and carry out a New Orleans-based “listening post” to share with faith leaders in the city the mission and strategies of the Bread or Stones campaign and interest them in becoming an active member of the campaign.

Progress Toward Goals (2-8 pages)

Use this section to provide more detail on the progress made toward goals during the grant year just completed.

In addition, if not already addressed, please consider the following:

1. Activities: Summarize your achievements as well as the outcomes and lessons you have learned during the life of the project. If some intended activities were not undertaken, please note them and explain why they were not pursued. Describe any new activities or modifications and why they were added.

Notable activities include:

- Publication and widespread distribution of the 2016 *JustSouth Index* social indicators project.
- Monthly distribution of e-newsletter to 6600 recipients regarding a timely issue related to race, poverty, or immigration with an open rate of 19 percent.
- Presentation of economic and social impacts of Medicaid expansion at Louisiana Health Summit.
- Presentation of economic analysis related to Louisiana School Readiness Tax Credits to Louisiana Senate Revenue and Fiscal Affairs Committee.
- Development and presentation of materials related to tax fairness and adequate funding of foster care services at Mississippi Catholic Day at the Capitol.
- Provision of information to Catholic Charities of Jackson and Mississippi Catholic bishops about harmful payday legislation in Mississippi.
- Publication of the Bread or Stones Campaign video and brochure for use at statewide listening posts.
- Support of the hiring and onboarding process for a statewide coordinator for the Bread or Stones campaign.
- Participation in the Together Louisiana faith-based coalition, LA Building Economic Security Together (LABEST) coalition, Louisiana Youth Justice Coalition, Louisiana for Responsible Lending, Louisiana Catholics Committed to Repeal of the Death Penalty, and Justice for Immigrants.
- Increase in media attention including an increase in opinion articles placed in local and state news outlets and interviews on local television and radio stations.
- Development of the first *State of Working Mississippi* report since 2012 to analyze recent trends and make recommendations related to the state's labor force, jobs market, wages/income, and poverty.

Outcomes include work with other advocates, research, and writing to successfully influence policy change in the following areas:

- The Louisiana's Governor's decision to expand Medicaid, increasing healthcare access to approximately 375,000 persons; 225,000 persons already have signed up for coverage.
- The Louisiana Legislature's decision not to impose copayments or premiums for Medicaid beneficiaries, which would have created barriers to healthcare access for most vulnerable households.

- The Louisiana's Department of Health and Hospitals decision to apply for a waiver for adults without dependents to continue receiving federal food assistance benefits, which maintained benefits for 62,000 Louisianans.
- The Louisiana Legislature's refusal of anti-immigrant legislation.
- The Louisiana Legislature's refusal to increase the sales tax beyond one penny and to sunset the one penny increase in two years, which disproportionately affects taxpayers in the lowest income quartile.
- The Louisiana Legislature's decision not to expand predatory payday lending in the state.
- The Mississippi Legislature's decision to fully fund the Department of Children and Families, which is tasked with serving and protecting the 3,700 children in foster care.

NOTE: With public policy advocacy it is often difficult to pinpoint which particular activities were most effective in influencing policymakers. Usually it takes many different advocates working on many modes of education and communication to educate policy makers and the public in ways that create policy change.

Lessons Learned:

Louisiana advocates for tax reform must band together in a stronger fashion to enhance the call to increase tax adequacy and equity in the state. This will be a major factor in the state in 2017 as it faces further critical revenue and expenditure choices affecting low-income and vulnerable families.

Lessons learned include the need to coordinate a continued effort after the Catholic Day at the Capital in *Mississippi* to continue the engagement of Catholic advocates throughout the state and to gradually build a network of Catholic, religious, and civic advocates who are poised to take action at pivotal moments. Another major takeaway we had from this experience is that JSRI could greatly increase its impact on pressing issues of economic and racial inequities in Mississippi if we had even a part-time staff person located in Jackson, to coordinate research, education, and advocacy efforts in the state and to develop deeper relationships with advocates and grassroots leaders in the state.

2. Outcomes: If you have modified your intended outcomes, indicate the changes. Please describe any unanticipated outcomes. Does your experience suggest that original expectations for achieving these outcomes were realistic? If not, why not? How are you dealing with unrealistic expectations?

JSRI is measuring the success of our economic justice efforts through tracking the following outcome categories: shifts in social norms, strengthened alliances,

strengthened base of support, and improved policies. Achievements within those categories include:

Increase in salience of issues and shift in social norms:

Over the past two years, beginning with the January 2015 publication of *Too Much for Too Many: What does it cost families to live in Louisiana*, there has been a significant increase in local, state, and national media attention and coverage of JSRI's publications, statements, and press conferences. More recently, with the release of the inaugural edition of the 2016 *JustSouth Index* at a press conference on March 17, 2016, several media outlets attended and the findings of the first *JustSouth Index* were circulated widely in local, state, and national media outlets in the weeks that followed the press conference. On March 31, Loyola communications staff reported as follows:

We had more than 160 traditional print and digital pick-ups in March. Circulation statistics show that sites and periodicals have more than 83 million unique visitors and a potential viewership of more than 94 million.

Coverage also included posting on April 4, 2016 by the W. K. Kellogg Foundation [news](#).

JSRI also had several opinion pieces and articles published in Mississippi and Louisiana news outlets that included JSRI research findings or those of partner organizations, including:

- Editorial pieces regarding nutrition assistance, minimum wage increases, and payday lending.
- Articles printed in *Mississippi Catholic* on Tax Fairness and payday lending legislation.

Strengthened alliances and base of support:

JSRI also significantly strengthened its alliances and base of support through this project. With the addition of the economic policy specialist, JSRI was able to significantly enhance its research and analysis capacity, which increased our level of exposure to other organizations, foundations, and the public. Through this exposure, JSRI has developed new partnerships, begun the development of an advocacy network, and forged new areas of expertise including child care assistance, affordable housing, and food security.

JSRI developed educational and advocacy materials for use by Mississippi Catholic advocates at the 2016 Catholic Day at the Capital related to adequate funding for the state's foster care system and the need for an adequate, fair tax system in the state. Fr. Kammer addressed the advocates regarding Catholic social teaching on taxation.

Outcomes included media attention and issue salience among engaged Catholics in Mississippi.

The *JustSouth Monthly* is distributed to 6,600 persons, including JSRI's own mailing list, certain W. K. Kellogg Foundation grantees, and faculty, staff, and students of Loyola University. It averages a 19% opening rate. The *JustSouth Quarterly* is mailed to approximately 1,900 recipients.

3. [Environment/Challenges/Opportunities](#): Describe factors or circumstances (positive and/or negative) within your environment that affected progress toward achieving goals either generally or as they relate to specific activities. What challenges and opportunities have developed and how were they addressed?

One of the most significant challenges of working for low-income and vulnerable children in New Orleans, Louisiana, and Mississippi is the dominant conservative makeup of policymakers and the general population. Many are deeply influenced by myths about low-income people and a deep strain of racism endemic to the region and the nation. Anti-government sentiment, reflected strongly in the current election campaign, creates doubts about government's and civic society's ability to respond effectively to human and social needs and negatively affects attitudes towards programs of income support, health care, nutrition, and housing.

The election of John Bel Edwards as governor of Louisiana has created a certain level of optimism about more effective government, beginning with the first day in office when he signed an Executive Order to implement Medicaid Expansion, an issue on which JSRI has been working for several years but failing due to the opposition of Governor Bobby Jindal. Recruitment into the program through the Supplemental Nutrition Assistance Program lists has proven to be an effective way to expedite much needed health care, especially for low-income working families. The Legislature, however, continues to be dominated by forces which are adverse to expansion of supports for low-income and vulnerable children and families and will make additional efforts to expand family supports difficult, despite the Governor's leanings. It will be important for advocates to provide strongly persuasive materials to encourage support for families and their needs.

The development of various grassroots organizations such as [Together Louisiana](#) and [The Micah Project/PICO Interfaith Louisiana Together](#) and their ability to mobilize church congregations and individuals provide important opportunities for JSRI staff to provide educational and advocacy information to those who can and will use them in direct policy advocacy. Fr. Kammer has spoken at events for Together Louisiana and Ms. Donovan prepared an [educational handout](#) on Medicaid Expansion which was co-branded for use by The Micah Project. In the future, JSRI plans to continue and expand

its collaboration with such grassroots organizations and its educational support for their efforts on issues affecting low-income and vulnerable families.

4. Collaboration: If your project involved collaborating with other organizations or institutions, describe how these relationships helped or hindered your progress toward addressing needs.

This project included extensive collaboration with other organizations, which were extremely helpful in achieving our stated goals. JSRI provides timely and accurate research to a variety of partner advocacy organizations and coalitions.

JSRI has strong working relationships in Louisiana with The Budget Project, The Worker Center for Racial Justice (with its Congreso of Day Laborers, Women United for Justice, and National Guestworker Alliance), Together Louisiana, The Micah Project, Catholic Charities of New Orleans, Catholic Charities of Baton Rouge, the Louisiana Conference of Catholic Bishops, the Office of the Mayor, members of the City Council, *Puentes*, Burning Bush (advocacy group of Catholic Sisters), Catholic Charities Houma-Thibodeaux, Central and Southern Province of the Jesuits, Louisiana Capital Assistance Project, Louisiana for Alternatives to the Death Penalty, Center for Responsible Lending, AARP Louisiana, United Way of SE LA, Louisiana for Responsible Lending, , Louisiana ACLU, Voice of the Ex-Offender (VOTE), One Voice Louisiana, Families and Friends of Louisiana's Incarcerated Children, Isaiah Institute, and the Louisiana Interchurch Conference.

Mississippi: Seashore Mission/*El Pueblo*, Hope Policy Institute, Catholic Charities of Jackson, Catholic Charities of Biloxi, *Mississippi Catholic*, Mississippi Center for Justice, Moving Forward Gulf Coast, East Biloxi Community Collaborative, and the Steps Coalition of Biloxi.

Observations: Please share any other observations not noted above.

Future Plans (1-2 pages)

1. Has the project become self-sustaining? What activities are being continued?

The project is self-sustaining in part, given that some of the work is supported by interest payments from JSRI's endowment. We anticipate that the project will be increasingly self-sustaining as the publication of the *2016 JustSouth Index* peaked the interest of several local and national funders. We plan to annually update and publish the *JustSouth Index* in an effort to measure across states over time. We believe that the indicators included in the *Index* will allow us to pinpoint the positive and widespread impact of policy decisions such as the expansion of Medicaid in Louisiana or an increase in the minimum wage in a particular state. This will also allow us to deepen the analysis of the connections among racism, poverty, and immigrant exclusion.

JSRI is pursuing all available sources of grant funding to continue and expand our economic justice work and to improve the lives of vulnerable children and families. We have secured the services of a six-month Emerson Congressional Hunger Fellow for the period from September 15, 2016 to February, 2017 and two younger Jesuits to support research, one each in the summers of 2015 and 2016. We also have received confirmation of a small Oxfam Foundation grant of \$11,200 to allow us to recruit a sociology professor to support research and writing of a Mississippi workforce report to be completed by January, 2017. This will be a follow-up to the report on *The State of Working Mississippi* to be released in September, 2016. We also have approached the Entergy Foundation and Baptist Community Ministries regarding funding.

2. What structure has been established for the continuation of this project?

The economic policy specialist position at JSRI is the primary structure through which this project will continue. This in-house expertise is crucial to the success and continuation of JSRI's work on economic justice and the supervision of summer research interns and upcoming Hunger Fellow. Prior to the addition of this core position in-house, the responsibility for economic policy research and advocacy was carried part-time by the JSRI Executive Director Fr. Kammer.

3. What indications are there that this project can (or cannot) be adopted elsewhere?

This project could be adopted in other universities if the financial resources were available to allow research faculty to exist and to have time to blend research, broader education, and advocacy. Faith-based research and advocacy organizations in other locations also could develop capacity within their organizations to conduct research, education, and advocacy that is related to economic justice issues that are most pressing in their state or locality.

Dissemination (1/2 page)

1. What information or evaluation findings from your project have been made available to the field and how?

The primary vehicles for dissemination of the findings of economic policy research, as enumerated above, have been: publication in the regular *JustSouth Quarterly* (including the 2015 special report *Too Much for Too Many: What does it cost families to live in Louisiana?*) and the on-line *JustSouth Monthly*, as well as special reports such as publication and dissemination of the 2016 *JustSouth Index*, in addition to press conferences, media alerts, *piktochart* information charts, letters to the editor, opinion articles in Catholic and regular newspapers, radio and television interviews, posting to the JSRI website, and promotion through JSRI social media.

2. What plans do you have, if any, at this time for disseminating information about your project?

We will continue to use all of the above vehicles for dissemination of information about our project and its research, including the ability to do reiterative and cumulative reports which track the data on vulnerable children and families in Louisiana and Mississippi on an annual basis. Ms. Donovan also has submitted a proposal to the Jesuit Higher Education Conference coordinating committee to share information about the development, findings, and impact of the *JustSouth Index* with other leaders and representatives of U.S. Jesuit universities.

Project Director's Opinion (1/2 to 1 page)

1. What do you think are the most important outcomes and “lessons learned” from this project?

The most important outcomes and “lessons learned” are several:

- a. The addition of the Economic Policy Specialist allowed JSRI to commit the necessary professional resources to key research on economic security, as well as the connections among racism, poverty, and immigrant exclusion that were significant for advocates and others in Louisiana and Mississippi.
- b. If presented professionally (media pre-notices, press conference, multiple speakers, including affected families, policy recommendations, and attractive formatting), serious academic research can attract popular press and media coverage and wide dissemination for public education about vulnerable families.
- c. Serious academic research on the economic and social realities of vulnerable families can be used by various advocates, in conjunction with the efforts of many individuals and organizations, to influence policy-makers.
- d. Support received from Loyola University's offices of public affairs and publications has been critically important to producing and disseminating our research, educational materials, and opinions in ways a small core JSRI staff alone could not accomplish.
- e. Support received from Loyola University's development staff are essential to enable JSRI staff to build upon the interest generated among potential funders by our research and educational publications in our efforts towards sustainability.

- f. One lesson was that the comprehensive nature of the 2016 *JustSouth Index* covering fifty states and the District of Columbia meant that its conceptual design, research, writing, completion and publication took much longer than initially anticipated.
- g. A related lesson was that the earlier publication of a state-specific research product (Louisiana: *Too Much for Too Many*) laid the groundwork for the more comprehensive study and taught us about more effective ways of promotion and dissemination.

2. What recommendations would you make to other project directors working in this area or to the Foundation?

It is essential that persons assigned to this kind of research, education, and advocacy have few other responsibilities.

Other (1/2 page)

1. Please list any final issues that you would like to discuss with your Foundation program officer.

JSRI would be helped by any advice which the program officer might have, including reactions to this project, and any advice on future proposals to the Foundation.

2. If helpful, attach any final “selective” electronic appendices which clarify information contained in the body of the report – please be selective. Please do not include copies of newspaper articles, brochure, or detailed statistical reports related to the project or hard copies, videos or films unless significant and discussed/requested by your program officer.

JSRI has embedded hyperlinks to specific reports and documents that are online. As provided on page one of the instructions for this project, JSRI will send to the Foundation print reports, booklets, educational handouts, opinion pieces, and other media that were produced expressly with Kellogg grant funds as a means to inform and educate the public about our project.

