

The Reinvestment Fund (TRF) recently completed a study for the School District of Philadelphia that estimates the percentage of students that are income-eligible for free or reduced-price lunches in each of its schools. With the results of the report, the School District will be able to reevaluate and improve its school lunch program.

The traditional method for determining income-eligibility for the free or reduced-price lunch program is to collect applications from students. These applications must then be evaluated for income-eligibility and a portion must be validated by District officials, including principals, teachers, and support. In Philadelphia, this added unnecessarily to over-burdened School District staff, as well as to the paperwork required from parents and the stigma of being identified as the “poor student.”

Through a unique partnership with the U.S. Department of Agriculture (USDA), the School District of Philadelphia will designate many of its schools as free for all students, without requiring the collection or processing of applications. While the School District provides free meals to all students in these schools, the USDA reimburses the School District according to the number of income-eligible students.

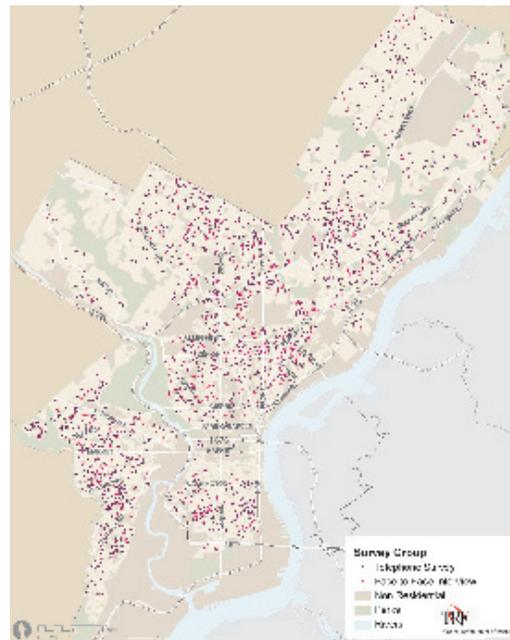
This pioneering approach, started in Philadelphia in the early 1990s, ensures that the maximum number of students benefit from free or reduced-price meals and removes the stigma children often experience because they receive free lunches. It has also proved to be much more cost-effective than the application process common across the nation.

This method of feeding students under the National School Lunch Program has made the School District of Philadelphia’s lunch program more efficient, more equitable, and more cost-effective. While Philadelphia is the first city with this program, the USDA may consider allowing other school districts to implement similar programs. The initiative’s success in Philadelphia has led other cities to explore with TRF the possibility of implementing similar studies in their school districts.

### Study Design

In 1991, the School District of Philadelphia commissioned a study for its pilot universal feeding program. The study was updated in 1994 and again this year. To deliver a high-quality product, TRF brought together a team of professionals that offered expertise in: study design and statistical consultation, public outreach and marketing, survey design and interviewing, and research and information. TRF’s Director of Policy Solutions, Ira Goldstein, Ph.D., was a principal on the pilot study in 1991. This year, Dr. Goldstein led the analysis, applying his knowledge of the program and his widely-recognized expertise in statistical analysis to the project. The team worked directly with the School District of Philadelphia, the Pennsylvania Department of Education, and the U.S. Department of Agriculture.

The School District of Philadelphia identified students who were automatically qualified for free lunches by matching student records to state public assistance and food stamp records. Previous studies suggest that schools with a high percentage of students that are automatically qualified for free meals (directly certified) have higher percentages of students income-eligible for free or reduced-price lunches. This observation, coupled with the desire to obtain the most precise and statistically reliable estimates of income-eligibility, led to the use of a stratified sample design.



This map shows the residential location of sampled households, distinguished by their participation in the telephone survey only or in both the telephone survey and validation survey.

A stratified random sampling process led to the selection of nearly 2,000 students, representative of the approximately 102,000 active on-roll but non-directly certified students in the District. Random samples of the non-directly certified households were drawn from each stratum. Those households were surveyed by telephone and categorized in terms of their income and household size. Based on this, students were categorized as income-eligible for free lunch, income-eligible for reduced price lunch, or not income-eligible for either.

What distinguishes our effort from the previous studies of 1991 and 1994 is an income validation component. In this study, households with reported incomes below 250% of poverty were encouraged to provide interviewers documentation to support their reported income. They were offered an incentive to participate and told that interviewers would meet with them at any convenient location. The purpose of this effort was to understand the extent to which the telephone survey gives answers that are representative of those that would be derived through this alternative method of data collection. The results obtained from both samples were remarkably similar.

## Outreach

Because the integrity of our analysis depended on the participation of as many students in our sample as possible, we made a great effort to reach out to the community to encourage participation. A letter from the CEO of the School District of Philadelphia preceded any contact with households; so too did a variety of public education and outreach efforts designed to raise the level of comfort and voluntary cooperation. Taken together, we believe these efforts maximized both overall participation and uniform participation across racial, ethnic and demographic groups.

## Efficiency and Access

The universal feeding program in Philadelphia is receiving national attention. The approach is saving the city's school district time and money, while maximizing the number of students benefiting from the National School Lunch Program. All students in schools with universal feeding are benefiting, including students whose family incomes may have been just above the qualification level. TRF's analysis in Philadelphia provides the foundation to realize these benefits.

## Our Team

**Shirley Robinson Watkins, M.ED, FCSI**, will work with district, local, state, and federal officials to help them understand and implement universal feeding. Ms. Watkins is a food service consultant and the principal founder of SR Watkins & Associates, where she leads her firm's efforts in School Nutrition Strategic Business Issues. Ms. Watkins was formerly the USDA Under Secretary for Food, Nutrition and Consumer Services, prior to which, she was Deputy Assistant Secretary for Marketing and Regulatory Programs. In 1993 she joined USDA as the Deputy Assistant Secretary for Food, Nutrition and Consumer Services. Prior to that, she Directed the award-winning Nutrition Services program in Memphis, Tennessee. In 1988-1989, Ms. Watkins served as President of the 60,000 members American School Food Service Association (now School Nutrition Association).

**MYRO Associates, LLC** will play an active role, primarily in coordination with the school district and publicizing the study to maximize representative participation. MYRO Associates is a management consulting partnership focusing on school business operations and specializing in school food service. Tom McGlinchy, Partner, was Director of Food Services for the School District of Philadelphia from 1986 to 1996, Executive Director of Facilities Management and Services from 1996 to 1999 and Managing Director/Chief Operating Officer at the time of his retirement from the District. Eric Shapiro, Partner, spent eleven years with the District's Procurement Office and later was the Assistant Director of Food Services for Administration, Executive Director of Facilities Management of Services and Director of Operations for Charter Schools/EMOs during his tenure with the District. Eric Shapiro and Tom McGlinchy coauthored and designed the original Paperwork Reduction and Alternatives for Meal Counting Pilot Program in 1989. Tom and Eric are intimately familiar with the requirements of the National School Lunch Program and the operations of school foodservice programs.

### THE REINVESTMENT FUND

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### ABOUT TRF

The Reinvestment Fund (TRF), a national leader in the financing of neighborhood revitalization, has invested \$1.2 billion in Mid-Atlantic communities since 1985. A CDFI, TRF finances housing, community facilities, supermarkets, commercial real estate and energy efficiency projects. It also provides public policy expertise by helping clients create actionable solutions and by sharing data and analysis via [www.PolicyMap.com](http://www.PolicyMap.com).