

LIVE UNITED



UNITED WAY OF METROPOLITAN CHICAGO

INCOME ISSUE AREA MEASUREMENT
FRAMEWORK

JULY 1, 2017 – JUNE 30, 2019

MEASUREMENT FRAMEWORK OVERVIEW

UWMC has identified key indicators of progress and success for each Income strategy that drive toward specific outcomes. The following pages contain a complete list of indicators, arranged by strategy, as well as detailed definitions of terms. Partner agencies are required to report data for **all** of the indicators in each strategy for which funding is received (e.g. if funded for Income – Career Pathways, an agency must report on all Career Pathways indicators). UWMC utilizes outcome data to gauge the performance of an agency throughout the program year.

UWMC does not fund on a fee-for-service basis, but rather funds programming that will deliver on identified outcomes. Therefore, organizations must agree to report on outcomes and indicators for **all participants** in UWMC-funded programs, rather than some portion of client population served.

In addition to the strategy indicators, partner agencies will also be required to report annually on the following elements:

- *Strategy Narratives*: Qualitative questions associated with specific strategies.
- *Demographics*: Program participants' race/ethnicity, age, gender, economic status, disability status (if available), sexual orientation (if available), veteran status (if applicable), homeless (if applicable), wards of the state/youth in foster care (if applicable), female heads of household (if applicable), immigrant or refugee status (if applicable), criminal background/re-entry population (if applicable). Reported by agency, not program.
- *Communities Served*: Number of people served living in each Chicago Community Area or suburban municipality within UWMC's footprint. Reported by agency, not program.
- *Site Locations*: Name and address of locations where UWMC-funded programs are conducted.
- *Success Story*: The story of one client who has successfully utilized the agency's UWMC-funded program.

INCOME – ALL FY18-19 INDICATORS BY STRATEGY

FINANCIAL CAPABILITY

Build financial knowledge and improve financial practices

# of participants establishing financial baseline/creating financial plan	# of participants enrolled and completing Financial Capability training, modules, and courses
# of participants improving financial position	# participants working toward reducing debt
# of participants who become banked	# of participants receiving new or maintaining public/private benefits

CAREER PATHWAYS

Prepare individuals for success in a variety of jobs and careers

# of participants who become job ready	# of participants gaining recognized skills or credentials
# of participants placed in jobs during the program year	# of participants placed during the program year who retain their jobs for a minimum of 90 days
# of participants who improve their job quality during the program year	# of participants advancing employment during the program year

TAX PREPARATION

Access no-cost tax preparation and household stabilizing supportive services

Total cost of Volunteer Income Tax Assistance (VITA) program	Total amount of tax refunds received by participants
Total amount of Earned Income Tax Credit (EITC) received by participants	Total number of tax returns completed
Total number of previous years' tax returns completed	Total amount of previous years' tax refunds received by participants

STRATEGY: FINANCIAL CAPABILITY	
Build financial knowledge and improve financial practices	
OUTCOME: People increase financial capability	
INDICATOR	DEFINITION
# of participants establishing financial baseline/creating financial plan	<p>To “establish their financial baseline,” each client must successfully complete at minimum the following three key assessment activities:</p> <ul style="list-style-type: none"> • Identify and document in writing at least one SMART¹ financial goal to achieve in the next year • Complete a baseline budget • Complete a baseline balance sheet
# of participants enrolled and completing Financial Capability training, modules, and courses	<p>Successful completers of this program area must demonstrate completion of courses, modules, workshops, or 1:1 coaching sessions that fully cover all five of the core competency areas below :</p> <ul style="list-style-type: none"> • Earning – pre- and post-employment financial success planning • Spending – creating and managing a household financial budget • Credit building and borrowing – understanding how to correctly and safely use credit • Saving – effectively managing income and saving for emergencies or asset development • Protecting finances – avoiding financial tricks and traps and providing access to relationships with trusted financial partners and service providers
OUTCOME: People convert knowledge into practice	
INDICATOR	DEFINITION
# of participants improving financial position	<p>To “improve financial position,” each client must show progress on at least one of the following:</p> <ul style="list-style-type: none"> • Increasing net worth – e.g. reducing debt or increasing household income • Improve credit score (FICO®) • Develop a relationship with a mainstream banking institution or credit union • Claim the EITC, CTC, and other tax credits designed to support low-income filers
# participants working toward reducing debt	<p>To reduce debt, clients will:</p> <ul style="list-style-type: none"> • Work with a coach/qualified staff person to “pull” credit report(s) and develop a plan to address any adverse findings, including submitting disputes for all errors and negotiating debt settlement • Develop a spending plan or budget focusing on strategies for managing finances

¹ SMART - Specific, Measurable, Achievable, Realistic, and Time-Bound

STRATEGY: FINANCIAL CAPABILITY (continued)
Build financial knowledge and improve financial practices

OUTCOME: Access environments that support advancement

INDICATOR	DEFINITION
<p align="center"># of participants who become banked</p>	<p>A client becomes “banked” when they:</p> <ul style="list-style-type: none"> • Open a new checking or savings account at a mainstream financial institution, such as a bank or credit union: <u>and</u> • Use this new account at least monthly for a minimum of 90 days. <p>• <u>Note</u>: During the period of time between when the person opens the account and the 90-day mark, individuals will be counted as “opening an account,” but not as “banked.” Establishing or maintaining financial relationship with a mainstream financial institution or (community based) Credit Union.</p>
<p align="center"># of participants receiving new or maintaining public/private benefits</p>	<ul style="list-style-type: none"> • A participant “receives a new benefit” when it is processed and usable, for example, when they receive their first check, housing subsidy, or medical card. • “Benefits” include: TANF, tax credits, SSI/SSDI, SNAP/LINK, WIC, subsidized housing (public, Section 8), LIHEAP, weatherization, utility, eviction prevention, subsidized fare cards and vouchers, childcare subsidies, Medicaid, Medicare, and All Kids

STRATEGY: CAREER PATHWAYS	
Prepare individuals for success in a variety of jobs and careers	
OUTCOME: Increase employability	
INDICATOR	DEFINITION
# of participants who become job ready	<ul style="list-style-type: none"> • In order to be considered “job ready,” a client must successfully complete the agency’s entire job readiness training program and pass any professional assessments or screenings; clients must also successfully pass any required examinations.
# of participants gaining recognized skills or credentials	<p>In order to “gain recognized skills or credentials,” a client must <u>complete</u> one or more of the following:</p> <ul style="list-style-type: none"> • Digital literacy training (computer) • English as a Second Language training (ESL) • Adult literacy/numeracy training • General Education Development (GED) certificate • High school diploma • Apprenticeship program • Occupational skills certification • Occupational skills licensure • Associate’s degree– AA, AS, (accredited) • Bachelor’s degree– BA, BS (accredited) • Master’s degree– MA, MS (accredited)
OUTCOME: Secure employment	
INDICATOR	DEFINITION
# of participants placed in jobs during the program year	<ul style="list-style-type: none"> • In order to be “placed in a job,” a participant must obtain and maintain paid employment at the same job for a minimum of 30 days. • “Paid employment” can include paid internships, subsidized employment, transitional jobs and apprenticeships, or part-time work.
# of participants placed during the program year who retain their jobs for a minimum of 90 days	<ul style="list-style-type: none"> • In order to be “retained,” a client must be continuously employed for 90 days, either in the same job, a comparable/better job in the same organization, or another comparable job in the community. • “Comparable” means a similar position, better work hours, schedule, wage, or benefits. • “Continuously” means working, uninterrupted, all weeks at least part-time for the 90 day period.

STRATEGY: CAREER PATHWAYS (continued)	
Prepare individuals for success in a variety of jobs and careers	
OUTCOME: Advance employment	
INDICATOR	DEFINITION
# of participants who improve their job quality during the program year	<p>In order to “improve job quality,” participants must experience one or more of the following:</p> <ul style="list-style-type: none"> • Increase in wages/earnings • Receipt of new/improved employer-sponsored benefits (e.g., vacation/sick time, insurance, 401k, pre-tax transportation, childcare, medical programs, or tuition reimbursement). • Improvements to work schedule, including sufficient hours to meet basic needs, predictability of shift, flexibility to promote work-life balance, and increased social connections.
# of participants advancing employment during the program year	<p>In order to advance employment, participants will either:</p> <ul style="list-style-type: none"> • Improve their role or job function through a recognized promotion <p>OR</p> <ul style="list-style-type: none"> • Improve their role or job function by obtaining a position with another employer

STRATEGY: TAX PREPARATION	
Access no-cost tax preparation and household stabilizing supportive services	
OUTCOME: Make ends meet	
INDICATOR	DEFINITION
Total cost of Volunteer Income Tax Assistance (VITA) program	<ul style="list-style-type: none"> • Dollar amount of program budget
Total amount of tax refunds received by participants	<ul style="list-style-type: none"> • Calculated total (\$) of all tax return amounts for all participants who qualify for a tax return
Total amount of Earned Income Tax Credit (EITC) received by participants	<ul style="list-style-type: none"> • Calculated total of all EITC refunds for all participants who qualify for EITC
Total number of tax returns completed	
Total number of previous years' State and/or Federal tax returns completed	<ul style="list-style-type: none"> • Previous years' tax returns include previously unfiled or unclaimed tax returns
Total amount of previous years' State and/or Federal tax refunds received by participants	<ul style="list-style-type: none"> • Calculated total (\$) of all previously unfiled or unclaimed tax return amounts