

# Implementation Plan Sample

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INSTITUTION NAME Sample

PREPARED BY UWBA

DATE 10/05/2021



POWERED BY



## CORE PRINCIPLES

SparkPoint Centers are the result of unique collaborations of agencies and institutions that are committed to improving financial stability outcomes for members of their communities. SparkPoint is replicating and improving the most innovative and promising national model, developed by the Annie E. Casey Foundation through its Center for Working Families program. The model rests on principles around common goals, best-practice service provision, and a partnership approach. Each SparkPoint Center is being developed organically according to local community needs and assets, but partners at each Center share a commitment to five principles:

1. We operate under the assumption that **families are creative, resourceful, and whole**. We take a holistic client/student-centered coaching approach, meeting individuals where they are and listening to their needs.
2. We provide a **seamless experience for clients** who are able to access multiple, coordinated services in one location. SparkPoint partners and collaborates with various institutional programs and departments as well as other nonprofit and government agencies in the community to provide services that address the multiple needs/challenges that students face.
3. We commit to **engaging with clients long-term**, meeting individuals/families where they are, understanding that individual experiences do not often follow a linear path.
4. We constantly **evaluate our programming and engage in learning** through the use of data and engaging with clients directly to ensure equitable outcomes and continuous improvement.
5. We create a welcoming and respectful environment, **valuing the dignity of all clients no matter their background or identity**, especially Black, Indigenous, Latinx, Asian, and other communities of color that have been historically marginalized by white supremacist institutions.

## CENTER SUMMARY

This section is an overarching summary of who your center will be, who you serve, and services offered.

### Summary paragraph of center:

SparkPoint at Sample Institution envisions a future where all students and their families are able to achieve and maintain financial stability. To realize this vision, SparkPoint's mission focuses on providing services that can help families improve credit scores, reduce debt, build income, and build and save assets.

# COMMITTEE MEMBERS

## PLANNING LEAD

| Name    | Agency             | Title/Role          | Advisory/Steering Committee | Email              |
|---------|--------------------|---------------------|-----------------------------|--------------------|
| Harriet | Sample Institution | Dean Student Equity | Advisory                    | Harriet@sample.edu |

## PLANNING COMMITTEE MEMBERS

| Name    | Agency             | Title/Role           | Advisory/Steering Committee | Email               |
|---------|--------------------|----------------------|-----------------------------|---------------------|
| Maya    | Sample Institution | VP Student Services  | Advisory                    | maya@sample.edu     |
| John    | Sample Institution | VP Financial Aid     | Advisory                    | john@sample.edu     |
| Malcolm | Sample Institution | Dean Student Culture | Advisory                    | malcolm@sample.edu  |
| Nina    | Sample Institution | Student              | Advisory                    | nina@my.sample.edu  |
| Michael | Credit Union       | Branch Manager       | Advisory                    | michael@credit.edu  |
| Jane    | Food Bank          | Program Coordinator  | Advisory                    | jane@foodbank.edu   |
| Xavier  | Legal Aid          | Attorney             | Advisory                    | xavier@legalaid.edu |
| Robert  | Human Services     | Cal Fresh Manager    | Advisory                    | robert@hhs.gov      |
|         |                    |                      |                             |                     |
|         |                    |                      |                             |                     |
|         |                    |                      |                             |                     |

## **DECISION MAKING STRUCTURE**

### **Define how decisions will be made:**

Decisions for SparkPoint at Sample Institution are made by quorum through modified consensus rather than majority rule. Modified consensus will be 50% plus 1. Each committee member has one vote. If the vote is split or the committee can't come to a consensus, the planning lead will make the final decision.

## **VISION STATEMENT**

### **Define your vision for the SparkPoint Center:**

Our vision for SparkPoint at Sample Institution is a center that meets students' basic needs by providing access to food security and job placement opportunities and by connecting them to services regarding individual needs. The center provides supports that lead to student academic success, student persistence, student retention, and degree completions, with fewer students on academic probation. The center serves as a hub of coordination between internal and external partners and is seen as a vital part of an institution dedicated to student success.

## TARGET AUDIENCE

### Define your target audience:

The target population for the East Contra Costa SparkPoint includes residents who do not yet meet the self-sufficiency standard, as established by the Insight Center for Community Economic Development ([insightcced.org](http://insightcced.org)). The SparkPoint will prioritize service to residents of Bay Point, Pittsburg, and Antioch, but will not make residency of these communities a requirement for membership. The East Contra Costa SparkPoint will strive to ensure that its membership base reflects the full spectrum of those who fall below the self-sufficiency standard.

## SERVICES

SparkPoint Sample Institution will provide enrolled students and local community residents with the following services:

| Financial                         | Career & Education                 | Basic Needs                           |
|-----------------------------------|------------------------------------|---------------------------------------|
| Financial Coaching                | Job Search Assistance              | Food Pantry                           |
| Credit/Debt Counseling and Repair | Education Counseling               | Benefits Screening and Advocacy       |
| Tax Preparation                   | Scholarship Assistance             | Emergency Direct/Cash/Rent Assistance |
|                                   | Financial Aid Education            | Health Insurance Enrollment           |
|                                   | Career Exploration and Development | Referral Services                     |
|                                   |                                    |                                       |
|                                   |                                    |                                       |
|                                   |                                    |                                       |

For the subcategories below, list a description of the services offered:

### FINANCIAL COACHING

Knowing how to manage your money, credit and bank account is very important and the financial services provided through SparkPoint will help anyone manage their finances better. Financial coaches will work one-on-one with clients to address financial issues, create budgets and develop actions plans to adhere to the budget.

## BENEFITS ENROLLMENT & ADVOCACY

SparkPoint assesses whether individuals are qualified for these benefits. Individuals will be provided with information regarding the various public benefit programs they are qualified for and referral the appropriate agency to make application. SparkPoint provides assistance with the application process.

Benefit Advocates provide critical peer- based information, support, and advocacy services to CalWORKs and other low-income parents, teaching them self-advocacy skills to access the support services and resources they need to support their families, complete education and training programs, and attain living wage jobs.

### CalWORKs-specific advocacy services include:

- counseling and support services for domestic violence
- extensions of the five-year lifetime limit on welfare
- accommodations for learning disabilities
- resources for childcare
- transportation
- books and school supplies
- welfare-to-work plans focusing on education and training programs that lead to higher-wage employment.

## STRATEGY FOR REFERRALS

SparkPoint Coaches will work with the client to identify appropriate referrals and provide a soft hand-off between client and referral service. Appropriate referrals will require the establishment of robust linkages with resources in the community related to housing, legal aid, and healthcare. Key partners include, but are not limited to the following:

| Provider               | Services  |
|------------------------|---|
| Housing Agency         | Provides affordable housing search and application assistance, deposit assistance |
| Mental Health Services | Provides crises intervention and counseling                                       |
| Legal Aid              | Provides services for consumer rights and immigration law                         |
|                        |   |
|                        |   |

## PARTNER LIST

| Fin On-Campus Partners                 | Description of Program/Agency  | Description of Relationship & Services Offered  | Contact & Agreement/ MOU Status            |
|--|--|---|--|
| TRIO Student Support Services          |  |   | Core Partner                               |
| CalWorks                               | Health and Human Services support for low income students                | Benefits screening and supports for low income students, including CalWorks, Childcare, CalFresh, Support for books/ supplies | Core Partner                               |
| Financial Aid                          | Financial Support for Students   | Education and assistance with applying for financial aid.   | Core Partner                               |
| Career Center                          | Career Services  | career readiness, and job search assistance for students  | Core Partner                               |
| Credit Union                           | Banking and financial Services for community                             | Financial and Credit Coaching, banking products for low income students   | Core Partner- Signed partnership agreement |
| Volunteer Income Tax Assistance (VITA) | Free Tax preparation by certified preparers low-moderate income families | Year round tax prep, up to 3 years back taxes   | Core Partner- Signed partnership agreement |
|  |  |   |  |
|  |  |   |  |



## **PARTNERSHIP AGREEMENTS**

Core partners agree to the following commitments: Designate a decision maker from their program or organization to attend meetings and shape direction of SparkPoint, contribute existing resources to the SparkPoint center, including staff, time, coordination and efforts, adherence to the MOU/Partner agreement and to jointly develop resources to sustain the center.

## SERVICE INTEGRATION

| Goal   | How?<br>Strategy completed<br>to achieve goal   | Who?<br>All Partners/<br>Core Partners/Staff |
|--|---|--|
| Have a clear agreed upon shared mission/vision and understanding how their roles fit-into or impact the larger SparkPoint mission.   | Co-develop mission and values.  | All Partners/Staff                           |
| Demonstrate a shared brand, viewing themselves as SparkPoint staff in addition to being staff of their individual partner agency (e.g., introducing themselves as part of SparkPoint when interacting with clients). | <ul style="list-style-type: none"> <li>- Develop Script for how to discuss SparkPoint within the institution.</li> <li>- Change signatures in all communications to show SparkPoint</li> </ul>  | Staff  |
| Use a standardized vocabulary/common language when referring to processes to clients, internal partners, and external public.  | <ul style="list-style-type: none"> <li>- Create standardized language glossary</li> </ul>   | Core Partners/ Staff                         |
| Have a clear referral system in place for clients to access additional services.   | <ul style="list-style-type: none"> <li>- Identify questions asked of students that lead to referrals.</li> <li>- Develop process flow and contact list for students to follow.</li> </ul>   | Staff  |
| Share a data system and routinely use this system to make decisions concerning center performance, strategy and/or clients.  | <ul style="list-style-type: none"> <li>- All staff use case management system: Exponent Case Management</li> </ul>  | Core Partners/ Staff                         |
| Communicate about decisions and have a unified and clear decision-making process that is shared across partners/ programs.   | <ul style="list-style-type: none"> <li>- Decision making structure = Modified consensus will be 50% plus 1.</li> <li>- Monthly Core Partner meetings to discuss programming and decision making.</li> <li>- Weekly staff meetings to share processes, review challenges and celebrate successes that can be shared externally.</li> </ul> | All Partners/ Staff                          |

|   |  |                      |
|---|--|----------------------|
| Have a shared logic model and goals and share progress and accountability equally with partner agencies.  | <ul style="list-style-type: none"> <li>- Partners agree to established goals outlined in logic model.</li> <li>- Regular check-ins with partners &amp; staff on progress towards goals.</li> </ul>   | Core Partners/ Staff |
| Responsibilities reflect a service-oriented approach where individual staff roles and responsibilities crossover what were previously separate jobs/ functions. | <ul style="list-style-type: none"> <li>- Cross train staff on coaching, data, and coordination of services</li> </ul>  | Staff                |
| Funding streams support the collaborative and staff use requirements from funding streams creatively to allow clients to experience seamless services.          | <ul style="list-style-type: none"> <li>- Core Partners identify at least 1 funding opportunity per year</li> </ul>   | Core Partners        |
| Take responsibility for ongoing casework of a client that spans across traditional program groupings (e.g., income support, workforce and benefits programs).   | <ul style="list-style-type: none"> <li>- Every coach reviews case notes on clients, to be aware of how clients are engaging with services.</li> </ul>  | Staff                |
| Hold continual training and development at regular intervals. Trainings are structured to meet the changing needs of staff.                                     | <ul style="list-style-type: none"> <li>- All coaches will participate in mandatory annual coaching trainings and confidentiality trainings.</li> <li>- Coaches will attend content specific trainings on an as needed basis.</li> </ul>                              |                      |
| Have a streamlined intake and assessment process across multiple programs and regularly utilize the information to make decisions about clients.                | <ul style="list-style-type: none"> <li>- Intake is completed by Coordinator at first appointment.</li> <li>- Assessments are completed by coaches at first appointment.</li> <li>- Follow up assessments are completed at the 30, 60, &amp; 90 day marks.</li> </ul> | Staff                |

## STAFFING

SparkPoint Sample is staffed with a Financial Coach, Career Coach, and Coordinator. In addition, an Credit Coach from the Credit Union will dedicate a portion of their job responsibilities to SparkPoint services.

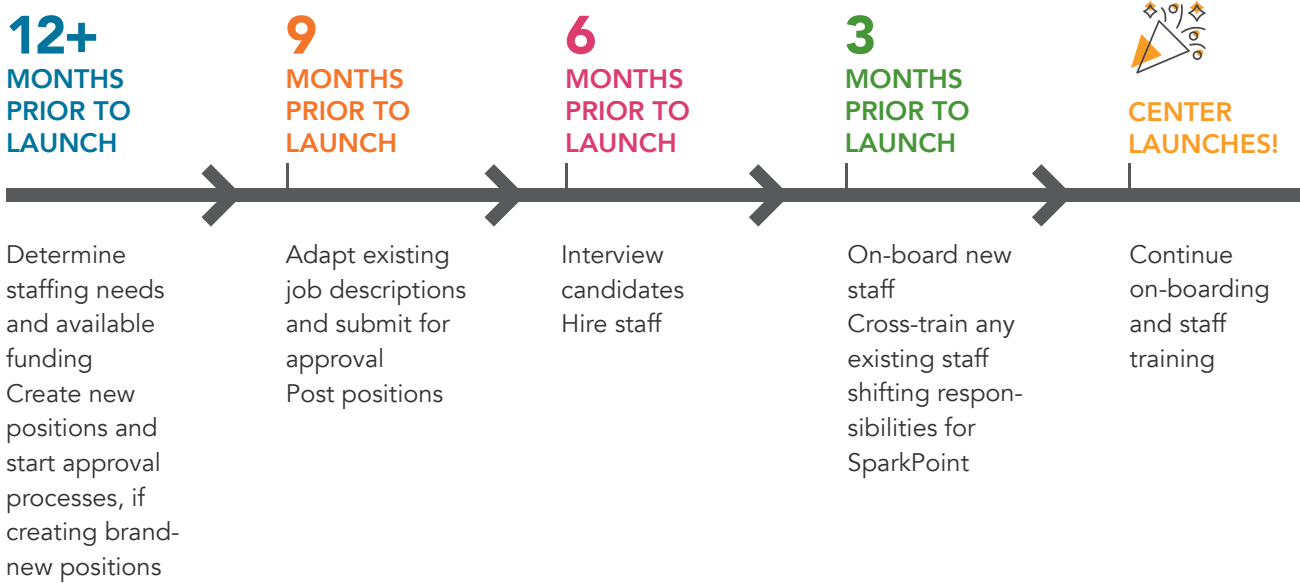
| Position                   | Job Responsibilities  | Start Date & FTE | Contact Information |
|----------------------------|---|------------------|---------------------|
| Center Director            | Responsible for planning, directing, and overseeing the SparkPoint Center at post-secondary institutions that support students and community members. S/he/they builds and maintains on and off-campus partnerships, supervises staff, manages the budget, oversees data and reporting, and leads fundraising efforts.  | .85 FTE          |                     |
| Site Coordinator           | Responsible for implementing SparkPoint programming, data management and reporting, and SparkPoint center operations. S/he/they provides general office manage and administrative support for the site. Promotes the availabil-ities of SparkPoint Services on campus among students, faculty, and staff. Sometimes also provides financial coaching as part of the role.   | 1.0 FTE          |                     |
| SparkPoint Financial Coach | Provides one-on-one personalized financial coaching to students and community members to create and maintain their budget, build savings, establish good financial habits, access banking and financial products, manage their credit, screen and enroll in public benefits, provide basic needs supports, and connect to additional resources. Builds relationships with students and community members. Supports individuals to set and track goals and conducts follow up as necessary. Utilizes a holistic, family-centered approach as necessary. Conducts data entry. | .50 FTE          |                     |
| Student Assistant          | Supports the Site Coordinator around data entry, running reports, scheduling, or interacting with students to respond to questions about the SparkPoint center. May screen students and community members for public benefits. May support on-site food pantry or additional projects.  | .25 FTE          |                     |
| Volunteer                  | Supports SparkPoint centers through conducting workshops, supporting events, supporting food pantries, or conducting financial coaching (for long-term volunteers).   |                  |                     |
| Financial Aid Technician   |   | .25 FTE          |                     |
| Career Coach               |   | .50 FTE          |                     |

## STAFF DEVELOPMENT/ON-BOARDING SCHEDULE:

|                | Prepare<br>(1-4 weeks prior to start)   | Welcome/Orient<br>(First 1-2 weeks)  | Connect/Integrate<br>(First 1-3 months)  |
|----------------|---|--|--|
| Manager        | <ul style="list-style-type: none"> <li>• Request technology (hardware, software)</li> <li>• Order supplies</li> <li>• Identify seating location</li> <li>• Communicate first day logistics</li> <li>• Prepare desk and office</li> <li>• Prepare welcome folder or binder</li> <li>• Create schedule for first few weeks</li> </ul> | <p>Announce hire to department, team, or area</p> <ul style="list-style-type: none"> <li>• Explain role, responsibilities &amp; expectations</li> <li>• SparkPoint Orientation</li> <li>• Give tour of local work environment(s)</li> <li>• Introduce employee to co-workers and partners</li> <li>• Introduce local IT systems, administrative &amp; financial procedures</li> <li>• Discuss communication norms</li> <li>• Order business cards</li> <li>• Connect with local United Way or other backbone to discuss specific training, getting connected to the network</li> </ul> | <p>Announce hire to department, team, or area</p> <ul style="list-style-type: none"> <li>• Explain role, responsibilities &amp; expectations</li> <li>• SparkPoint Orientation</li> <li>• Give tour of local work environment(s)</li> <li>• Introduce employee to co-workers and partners</li> <li>• Introduce local IT systems, administrative &amp; financial procedures</li> <li>• Discuss communication norms</li> <li>• Order business cards</li> <li>• Connect with local United Way or other backbone to discuss specific training, getting connected to the network</li> </ul> |
| HR             |   | <ul style="list-style-type: none"> <li>• HR paperwork and new hire policies</li> </ul>   |  |
| Facilities/ IT |   | <ul style="list-style-type: none"> <li>• How to find and request office supplies</li> <li>• IT systems</li> </ul>  |  |
| Employee       |   | <ul style="list-style-type: none"> <li>• Review on-boarding documents</li> <li>• Learn policies and systems</li> </ul>   | <ul style="list-style-type: none"> <li>• Meet with partners</li> <li>• Set goals</li> <li>• Attend relevant trainings (e.g. data system)</li> <li>• Meet with peers from another SparkPoint Center</li> <li>• Continued training through Association of Financial Counseling and Planning Education (AFCPE) or other programs</li> </ul>   |
|                |   |  |  |

## HIRING TIMELINE

The timeline for hiring the Director, Coordinator and Coaches were completed in Spring 20xx. Positions are funded permanently by Student Services. The Financial Aid Tech will dedicate .25 FTE to the SparkPoint Center from their institutional role in the Financial Aid.



## SCHEDULING

Use the chart to plan the schedule for the SparkPoint’s operation at initial launch.

|           | Sunday | Monday                        | Tuesday                     | Wednesday                   | Thursday                  | Friday | Saturday  |
|-----------|--------|-------------------------------|-----------------------------|-----------------------------|---------------------------|--------|---|
| Morning   |        | Financial Coach 1<br>9am-12pm | Credit Coach<br>9am-12pm    | Financial Coach<br>9am-12pm | Credit Coach<br>9am-12pm  |        | Food Distribution<br>3rd Sat. Month<br>10am-2pm |
| Afternoon |        | Food Pantry<br>1pm-4pm        | Credit Coach<br>12:30pm-4pm | Financial Coach<br>1-5pm    | Credit Coach<br>12:30-4pm |        |   |
| Evening   |        |                               |                             | Benefits Coach<br>4-8pm     |                           |        |   |

## LOCATION

SparkPoint Center Address: xxxx Center Ave.

Phone Number: xxx-xxx-xxxx

E-Mail: xxx@samplesparkpoint.edu

## MARKETING AND OUTREACH

### Define Marketing and Outreach Strategy:

At Sample SparkPoint, we work to meet the needs of students with the following strategies.

1. Tailored materials to our student population including print and digital media, social media and other mass communications.
2. Outreach through student and community based programs and faculty presentations.

## BUDGET PLAN

| REVENUE               | YEAR 1         | YEAR 2         | YEAR 3         |
|-----------------------|----------------|----------------|----------------|
| Government grants     | 120,000        | 120,000        | 120,000        |
| Institutional funding | 450,000        | 475,000        | 485,000        |
| Foundation grants     | 5,000          | 10,000         | 15,000         |
| Individual donations  |                |                |                |
| Earned income         |                |                |                |
| Other revenue         |                |                |                |
| <b>TOTAL REVENUE</b>  | <b>575,000</b> | <b>610,000</b> | <b>630,000</b> |

| EXPENSES                                   |                |                |                |
|--|----------------|----------------|----------------|
| <b>PERSONNEL COSTS</b>                     |                |                |                |
| Staff salaries and wages                   | 300,000        | 320,000        | 330,000        |
| Benefits                                   | 175,000        | 180,000        | 185,000        |
| <b>PROFESSIONAL FEES/CONTRACTS</b>         |                |                |                |
| Consultants/professional fees              | 30,000         | 30,000         | 30,000         |
| Subcontracts with partner agencies         | 45,000         | 45,000         | 45,000         |
| <b>PROGRAM AND OPERATING COSTS</b>         |                |                |                |
| Program Supplies                           | 10,000         | 15,000         | 15,000         |
| Student incentives                         | 1,500          | 3,000          | 5,000          |
| IT equipment/software                      |                |                |                |
| Cell phone & internet                      |                |                |                |
| Data collection/evaluation                 |                |                |                |
| Postage and shipping                       |                |                |                |
| Rent and occupancy                         |                |                |                |
| Printing and publications                  |                |                |                |
| Marketing and outreach                     |                |                |                |
| Travel                                     | 500            | 500            | 500            |
| Conferences, meetings, workshops, training | 5,000          | 6,500          | 9,500          |
| Interest                                   |                |                |                |
| Depreciation, depletion, etc.              |                |                |                |
| Admin and other expenses not covered above | 12,500         | 10,000         | 10,000         |
| <b>TOTAL EXPENSES</b>                      | <b>575,000</b> | <b>610,000</b> | <b>630,000</b> |



## SUSTAINABILITY PLAN

### **I. Timeline of Programming, History, Milestones**

Sample SparkPoint launched in 20xx, providing services including benefits assistance, financial literacy, and food distribution.

### **II. Our Problem Analysis** (Why do you have a SparkPoint center? What data describes the need for SparkPoint? What is the context in which your center operates?)

Supporting students' basic needs has many benefits for postsecondary institutions, such as helping to improve student academic performance, retain federal financial aid, promote retention and degree completion, generate more tuition dollars, and increase overall enrollment.

### **III. Our Sustainability Definition** (What is your definition of sustainability for your center? What are your sustainability goals?)

Sample SparkPoint will be written into institutional department budgets by 20xx for 75-80% of operational budget. SparkPoint will fundraise through outside funding sources for 15-20% operational budget.

**IV. Key Levers in Our Sustainability** (What are important considerations as you seek funding? What needs to be discussed more? Where are the opportunities/threats?)

- Year 1: Sample SparkPoint has been written into departmental budgets for 78% operational expenses. Sample SparkPoint has applied for and received 20% operational budget expenses in government grants and 2% in other funding.

- Year 2: Sample SparkPoint has continued to be written into departmental budgets for 78% operational expenses. Sample SparkPoint has applied for and received 20% operational budget expenses in government grants and in 2% in other funding.

- Year 3: Sample SparkPoint has been written into departmental budgets for 75% operational expenses. Sample SparkPoint has applied for and received 20% operational budget expenses in government grants and 5% in other funding.

**V. Our Core Programs** (What are your strongest program elements?)

Sample SparkPoint core programs include food pantry, emergency assistance, the Dream Center and Financial Coaching.

**VI. Policy Landscape and Opportunities** (What are opportunities to obtain dedicated funding for the program from institutional, city, county, state, or federal sources?)

Sample SparkPoint is in the process of implementing AB132 to launch basic needs centers with guidance for Sample institution.

**VII. Current Revenue Model** (Insert chart breaking down categories of revenue and its percentages – government, foundation, individual, earned, etc.)

Sample SparkPoint’s current revenue model has been funded primarily through foundation grants to launch the SparkPoint.

**VIII. Ideal/Intended Revenue Model** (Insert chart illustrating ideal revenue categories and percentages. How does this address key levers in your sustainability, build on your core programs, and consider the opportunities in your policy landscape?)

Sample SparkPoint will move to a revenue model that is funded by institutional funding and government funding, with less reliance on foundation grants.

**IX. Leadership and Human Capital** (What leadership and staffing is available to take what is outlined in this plan to shift the center from its current revenue model to its intended one?)

Sample SparkPoint is lead by the SparkPoint Director. There are 5 additional staff members.

**X. Key Decisions** (What decisions have you made, and what is your timeline to implement these decisions?)  
SparkPoint will utilize modified consensus to make decisions.

**XI. Measuring Our Progress** (How will you know that progress is being made?)  
To measure progress against established goals, we will use the data management system. We will hold quarterly steering committee meetings to measure progress towards sustainability, partnership, and service integration goals.

# EVALUATION AND LEARNING

## INSTRUCTIONS

Briefly describe your program using the instructions below and fill out each column of the logic model. Each outcome (or goal) should directly relate to program activities and the target population (described in outputs) that you will serve in this upcoming fiscal year.

- Inputs.** Briefly describe the resources and partnerships that will be essential for implementing your program successfully.
- Activities.** Briefly describe the activities that your center plans to conduct in this upcoming fiscal year.
- Outputs.** Briefly describe the measures you will use to understand how successfully the program has been implemented as planned. List the specific outputs that you will measure, which result from each proposed goal and activity. Outputs can include the number of people served as well as short-term measurable benefits received by participants as a result of their involvement in your program.
- Outcomes (Goals).** Briefly describe the outcomes (or goals) you will use to determine whether your program has successfully helped clients reach their goals. List the specific outcomes that you will measure, which result from each proposed goal and activity. Outcomes include intermediate- or long-term impacts that represent achievement toward your program goal. For outcomes marked with an asterisk (\*), please refer to the table below for definitions.

| <b>INPUTS</b><br>What resources are used to implement the program?  | <b>ACTIVITIES</b><br>What activities are planned?   | <b>OUTPUTS</b><br>Who was served?   | <b>OUTCOMES</b><br>How successful are the activities in helping clients reach goals?  |
|---|---|---|---|
| <ul style="list-style-type: none"> <li>• \$_____ revenue</li> <li>• Staffing (including lead agency and partner FTEs and volunteers providing services)                             <ul style="list-style-type: none"> <li>○ _____# Staff</li> <li>○ _____# Volunteers</li> </ul> </li> <li>• In-kind support (ex: Mission Asset Fund)</li> <li>• Partnerships</li> </ul> | <ul style="list-style-type: none"> <li>• Provide financial coaching to clients</li> <li>• Provide career coaching to clients.</li> <li>• Staff attend training on family-centered coaching model</li> <li>• Provide direct assistance services to help clients meet basic needs.</li> </ul> | <ul style="list-style-type: none"> <li>• ___ # total students served</li> <li>• ___ # total student parent served</li> <li>• Total number of partnerships established to promote integrated services</li> <li>• ___% of clients re-assessed</li> <li>• # staff trained on family-centered coaching model</li> <li>• Total number of practices and policies implemented to support diversity, equity, and inclusion</li> </ul> | <ul style="list-style-type: none"> <li>• ___# of students who enroll in or maintain public benefits</li> <li>• ___% of students with improved persistence rates</li> <li>• ___% of students with successful completion of education or training program</li> <li>• ___% of measurable clients who reach their own financial goal</li> <li>• ___% of measurable clients reach 30% positive improvement in any financial category (income, savings, credit, debt)</li> <li>• 1-2 Client impact stories or quotes</li> </ul> |

## DATA TRACKING

### Case Management Database:

Sample SparkPoint will use Exponent Case Management as the data tracking tool to capture outcomes listed in the logic model. The Sample SparkPoint Coordinator will be responsible for data tracking/reporting and recommend changes as necessary to program strategy.

## CLIENT JOURNEY

Put a picture of your finalized client journey map here:

