

Implementation Plan Sample

INSTITUTION NAME Sample

PREPARED BY UWBA

DATE 5/05/2023



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 your SparkPoint Center including who you serve and what services are offered.

Summary paragraph of SparkPoint 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@legalaids.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 SparkPoint 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.

PRIORITY POPULATION

Define your priority population:

The priority population for the SparkPoint Sample Institution includes residents who do not yet meet the self-sufficiency standard, as established by the [Insight Center for Community Economic Development](#). The SparkPoint will prioritize services to students of Sample Institution, but will not make this a requirement for membership. SparkPoint Sample Institution will strive to ensure 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 be referred to the appropriate agency to apply. 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 and rental assistance
Mental Health Services	Provides crises intervention and counseling
Legal Aid	Provides services for consumer rights and immigration law

PARTNER LIST

Partner Name	Description of Program/Agency	Description of Relationship & Services Offered	Contact & Agreement/ MOU Status
TRIO Student Support Services	Federal outreach and student services program designed to identify and provide services for low-income students, first-generation students and students with disabilities.	Academic support services such as transfer planning and tutoring	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 for low-to moderate-income families	Year round tax prep, up to 3 years back taxes	Core Partner: Signed Partnership Agreement
Local Housing & Rental Assistance Program	Rental assistance & emergency housing services	Screening for rental assistance and other housing support services for students experiencing housing insecurity	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? Strategy completed to achieve goal	Who? All Partners/ Core Partners/Staff
Have a clear agreed upon shared mission/vision and understanding how their roles fit into or impact the larger SparkPoint mission.	<ul style="list-style-type: none"> – 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"> – Develop script for how to discuss SparkPoint within the institution – Change signatures in all communications to show SparkPoint 	Staff
Use a standardized vocabulary/common language when referring to processes to clients, internal partners, and external public.	<ul style="list-style-type: none"> – Create standardized language glossary 	Core Partners/Staff
Have a clear referral system in place for clients to access additional services.	<ul style="list-style-type: none"> – Identify questions asked of students that lead to referrals – Develop process flow and contact list for students to follow 	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"> – All staff use case management system: Exponent Case Management 	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"> – Decision-making structure = Modified consensus will be 50% plus 1 – Monthly Core Partner meetings to discuss programming and decision making – Weekly staff meetings to share processes, review challenges and celebrate successes that can be shared externally 	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"> – Partners agree to established goals outlined in logic model – Regular check-ins with partners & staff on progress towards goals. 	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"> – Cross train staff on coaching, data, and coordination of services 	Staff
Ensure that there are sufficient funding streams to support SparkPoint Center staff, collaborations with partners and core programming and that these funding streams align with the Center's goals.	<ul style="list-style-type: none"> – Core Partners identify at least 1 funding opportunity per year 	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"> – Every coach reviews case notes on clients, to be aware of how clients are engaging with services 	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"> – All coaches will participate in mandatory annual coaching trainings and confidentiality trainings – Coaches will attend content specific trainings on an as needed basis 	Coaches/Staff
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"> – Intake is completed by Coordinator at first appointment – Assessments are completed by coaches at first appointment – Follow up assessments are completed at the 30, 60, & 90 day marks 	Staff

STAFFING

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

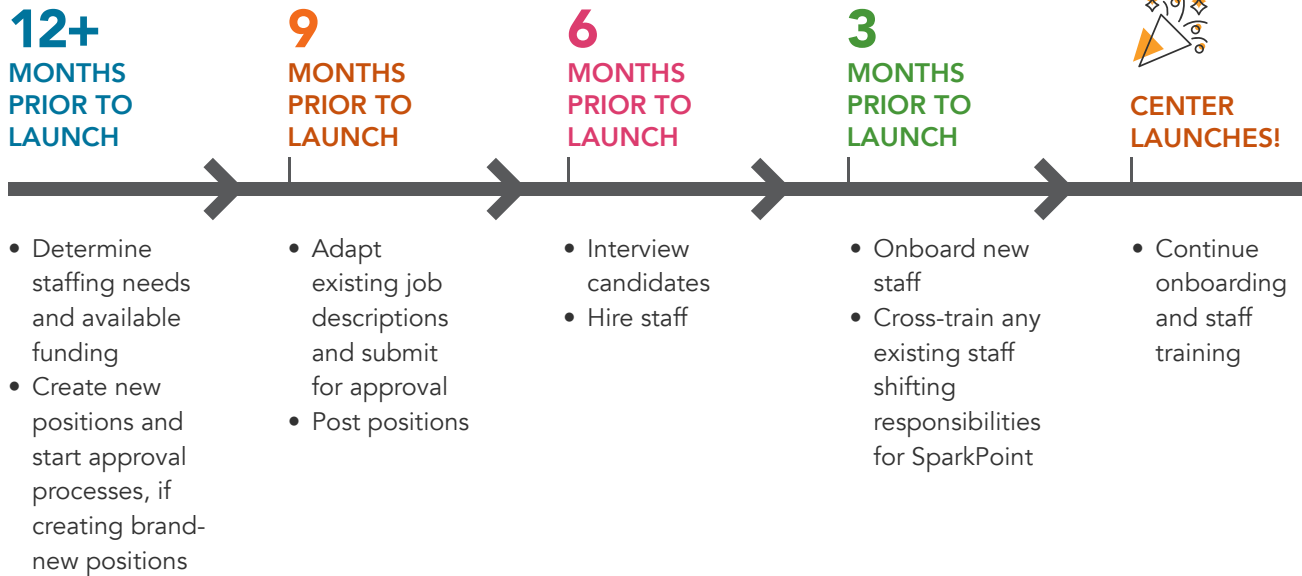
Position	Job Responsibilities	Start Date & FTE	Contact Information
Center Director	Responsible for planning, directing, and overseeing the SparkPoint Center at a postsecondary institution that supports students and community members. S/he/they builds and maintains on- and off-campus partnerships, supervises staff, manages the budget, oversees data and reporting, and leads fundraising efforts.	.85 FTE	Director@ SampleSparkPoint.edu
Site Coordinator	Responsible for implementing SparkPoint programming, data management and reporting, and SparkPoint Center operations. S/he/they provides general office management and administrative support for the site. Promotes SparkPoint services to students, faculty and staff. Sometimes provides financial coaching.	1.0 FTE	Coordinator@ SampleSparkPoint.edu
SparkPoint Financial Coach	Provides one-on-one personalized financial coaching to students and community members to create and maintain their budget, build savings, reduce debt, 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. Uses a holistic, family-centered approach as necessary. Conducts data entry.	.50 FTE	FinancialCoach@ SampleSparkPoint.edu
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	Assistant@ SampleSparkPoint.edu
Volunteer	Supports SparkPoint Centers through conducting workshops, supporting events, supporting food pantries, or conducting financial coaching (for long-term volunteers).		Volunteers@ SampleSparkPoint.edu
Financial Aid Technician	Supports SparkPoint clients with identifying and applying for financial aid opportunities to further their education.	.25 FTE	FinAidTech@ SampleSparkPoint.edu
Career Coach	Supports SparkPoint clients through one-on-one coaching, resume writing and assistance in identifying and applying for jobs and other professional development opportunities.	.50 FTE	CareerCoach@ SampleSparkPoint.edu

STAFF DEVELOPMENT/ON-BOARDING SCHEDULE:

	PREPARE (1-4 WEEKS PRIOR TO START)	WELCOME AND ORIENTATION (FIRST 1-2 WEEKS)	CONNECT AND INTEGRATE (FIRST 1-3 MONTHS)
MANAGER	<ul style="list-style-type: none"> Request technology (hardware, software) Order supplies Identify seating location Communicate first day logistics Prepare desk and office Prepare welcome folder or binder Create schedule for first few weeks 	<ul style="list-style-type: none"> Announce hire to department, team, or area Explain role, responsibilities & expectations SparkPoint Orientation Give tour of local work environment(s) Introduce employee to co-workers and partners Introduce local IT systems, administrative & financial procedures Discuss communication norms Order business cards Connect with local United Way or other backbone to discuss specific training, getting connected to the network 	<ul style="list-style-type: none"> Discuss & set goals Confirm understanding of key department policies & procedures Perform 3-month check-in Quarterly or periodic check-in to provide and receive feedback
HR, FACILITIES, AND IT		<ul style="list-style-type: none"> HR paperwork and new hire policies IT systems How to find and request office supplies 	
EMPLOYEE		<ul style="list-style-type: none"> Learn policies and systems 	<ul style="list-style-type: none"> Meet with partners Set goals Attend relevant trainings (e.g. data system) Meet with peers from another SparkPoint Center Continued training through Association of Financial Counseling and Planning Education (AFCPE) or other programs

HIRING TIMELINE

The timeline for hiring the Director, Coordinator and Coaches was 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 9am-12pm	Credit Coach 9am-12pm	Financial Coach 9am-12pm	Credit Coach 9am-12pm		Food Distribution 3rd Sat. Month 10am-2pm
Afternoon		Food Pantry 1pm-4pm	Credit Coach 12:30pm-4pm	Financial Coach 1-5pm	Credit Coach 12:30-4pm		
Evening				Benefits Coach 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	\$265,000	\$332,500	\$400,000
District/Institutional funding	\$450,000 to \$330,000	\$390,000	\$450,000
Foundation grants	\$105,000	\$105,000	\$105,000
Individual donations		\$2,500	\$2,500
Earned income			
Other revenue		\$1,000	\$2,500
TOTAL REVENUE	\$700,000	\$831,000	\$960,000

EXPENSES			
PERSONNEL COSTS			
Staff salaries and wages	\$350,000	\$420,000	\$525,000
Benefits	\$195,000	\$220,000	\$250,000
PROFESSIONAL FEES/CONTRACTS			
Consultants/professional fees	\$40,000	\$50,000	\$40,000
Subcontracts with partner agencies	\$55,000	@65,000	\$55,000
PROGRAM AND OPERATING COSTS			
Program supplies	\$20,000	\$25,000	\$30,000
Student incentives	\$5,000	\$7,500	\$7,500
IT equipment/software	\$5,000	\$5,000	\$5,000
Cell phone & internet	\$2,000	\$2,000	\$3,000
Data collection/evaluation			
Postage and shipping	\$1,000	\$2,000	\$3,000
Rent and occupancy			
Printing and publications	\$3,000	\$5,000	\$6,000
Marketing and outreach	\$5,000	\$7,000	\$10,000
Travel	\$1,000	\$1,000	\$1,000
Conferences, meetings, workshops, training	5,000	6,500	9,500
Interest			
Depreciation, depletion, etc.			
Admin and other expenses not covered above	\$13,000	\$14,000	\$15,000
TOTAL EXPENSES	\$700,000	\$830,000	\$960,000

SPARKPOINT OVERVIEW

I. OUR PROBLEM ANALYSIS (Why do you have a SparkPoint Center? What data describes the need for your SparkPoint Center? What is the context in which your Center operates?)

Financial barriers are the main reason that students do not achieve their educational goals at community college. Data from the Hope Center Survey in 2021 found that 60% of college students experience basic needs insecurity (food insecurity, housing insecurity and homelessness). Sample SparkPoint aims to address financial, food and housing insecurity by acting as both a financial education and literacy center, as well as a basic needs center. The aim of Sample SparkPoint is to support student achievement, disrupt cycles of poverty, advance economic mobility, and foster self-determination through the delivery of culturally relevant financial empowerment education and strength-based basic needs services.

II. TIMELINE OF PROGRAMMING, HISTORY, MILESTONES. (What are the major milestones of your SparkPoint Center that have happened and that you would like to see happen in the next year? In the next three years?)

2018: Sample SparkPoint launches with a Director, Coordinator/Financial Coach, small food pantry and one office for coaching

2020: Expanded food distribution, housing supports and emergency programs in response to pandemic

2021: Moved to a larger space and partnered with the Dream Center and Veterans Center, AB 132 passes requiring all community colleges in California to have a Basic Needs Center

2022-2023: Leveraged AB132 funding to support basic needs services, hired a Financial Coach and part-time Career Coach

Next 1 year:

- Expand partnerships to offer more services around transportation & childcare
- Build stronger partnership with Financial Aid Office to offer more financial supports to students

Next 3 years:

- Offer peer-to-peer financial coaching and workshops and incorporate financial literacy into other aspects of the standard student educational journey (e.g., first year courses, academic counseling, transfer planning, etc.)
- Expand incentive program to encourage students to attend financial workshops and work towards meeting their financial goals

III. OUR CORE PROGRAMS (What are your strongest program elements?)

- Financial coaching on topics such as goal setting, budgeting education, debt management, tax preparation, credit improvement, financial aid package assessment and planning.
- Educational counseling, career coaching
- Sample SparkPoint Food Pantry & Drive through grocery distribution
- Incentive program for students who complete financial goals
- Rental & emergency assistance programs
- Public benefits outreach, screening & enrollment

IV. CURRENT REVENUE MODEL (List or insert a chart breaking down categories of revenue and its percentages of your total budget – government, foundation, individual, earned, etc. What areas are under-funded?)

Fund Name	Amount	Percentage	Percentage by Category
District/Institutional Funding	\$330,000	47.1%	District/Institution - 47.1%
CalFresh Enrollment Funding	\$15,000	2.1%	Government – 37.8%
AB-132 Basic Needs Center	\$200,000	28.6%	
Student Equity Plan State Funding	\$50,000	7.1%	
Foundation Funding	\$60,000	8.6%	Foundation/Grants – 15.1%
UWBA Sample SparkPoint	\$45,000	6.5%	
Total	\$700,000	100%	100%

V. OUR FINANCIAL SUSTAINABILITY DEFINITION (What is your definition of financial sustainability for your Center? What are your financial sustainability goals?)

Sample SparkPoint defines financial sustainability as having dedicated, long-term funding to support SparkPoint staff and sufficient consistent funding (such as AB-132 funding) that allows us to provide existing services, as well as pivot and expand services based on the needs of students. Our financial sustainability goals include securing district funding for all staff positions.

VI. KEY LEVERS IN OUR SUSTAINABILITY (What are important considerations as you seek funding in the next year, two years, and so on? What needs to be discussed more? Where are the opportunities that you want to prioritize? Where are there risks/threats to revenue? For example, what is your current partnership model vs. your ideal partnership model? Are there any partnerships that lend themselves to increased funding?) Below are links to a couple resources you might find useful:

- [Charity Excellence Framework](#)
- [Pestle Analysis](#)

Important considerations as we seek funding include the length and stability of the funding source, the reporting and other requirements involved with the funding, and that the funding aligns with Sample SparkPoint’s priorities and programming. We would like to prioritize funding opportunities that offer long-term stable funding, that do not have too cumbersome reporting requirements and that are aligned with our priorities and programming to allow us to grow in sustainable ways. We would also like to prioritize partnerships that lead to in-kind support such as partnering with the Food Bank as well as opportunities for funding that allow innovative ways of addressing student needs.

Risks/threats to revenue include student enrollment as well as changing leadership at the college, district, state and federal levels which can lead to shifting political landscapes and funding resources.

VII. POLICY LANDSCAPE AND OPPORTUNITIES (What are opportunities to obtain dedicated funding for the program from institutional, city, county, state, or federal sources?)

AB132 funding at the state level offers support for basic needs services. There are also state funds that can be leveraged for CalFresh and benefits services. There are also opportunities to partner with campus programs that receive funding from the Chancellor's Office such as Veterans Services, Workforce Development and Health Services.

VIII. IDEAL/INTENDED REVENUE MODEL IN THE NEXT 3 YEARS (List or insert a chart illustrating ideal revenue categories three years from now including percentages. How does this address key levers in your sustainability, build on your core programs, and consider the opportunities in your policy landscape?)

Ideal revenue model for FY27

Fund Name	Amount	Percentage	Percentage by Category
District/Institutional Funding	\$450,000	46.9%	District/Institutional – 46.9%
CalFresh Enrollment Funding	\$20,000	2.1%	Government – 41.7%
AB-132 Basic Needs Center	\$215,000	22.4%	
Student Equity Plan State Funding	\$50,000	5.2%	
Workforce Accelerator Fund	\$115,000	11.9%	
Ongoing Foundation Funding	\$60,000	6.3%	Foundation/Grants – 10.9%
UWBA Sample SparkPoint	\$45,000	4.7%	
Fundraising (events, individual donations)	\$5,000	0.5%	Other – 0.5%
Total	\$960,000	100%	100%

This addresses our key levers in financial sustainability by increasing district funding to allow for stability in staffing positions. It also increases outside grant funding as a way of finding funding to try new programming and find innovative solutions for student needs.

IX. LEADERSHIP AND HUMAN CAPITAL (What leadership and staffing is available to meet funding requirements such as reporting and to take what is outlined in this plan to shift the Center from its current revenue model to its intended one? This could include staffing at the SparkPoint Center, lead agency, district or college foundation.)

Currently we have a SparkPoint Director and Coordinator, a Financial Coach, part-time Career Coach, Financial Aid Technician, Student Assistants and Volunteers. Meeting funding requirements and shifting to the ideal revenue model will also require support from the district and college leadership (e.g., VP of Student Services and College President).

X. KEY ACTIONS (What actions will you take to shift to your ideal revenue model, who will be responsible for those actions and what is your timeline to implement these? How will you address any risk associated with this revenue?)

Goal	Action Steps	Amount of revenue this would generate	Who's responsible for actions	Timeline
Increased college/district funding	Meet with college/district leadership, build support for SparkPoint programming	\$170,000	Director, Dean, SparkPoint Steering Committee	FY24-27
Pursue local grant opportunities through community foundations or other sources	Identify funding opportunities Apply for & secure funding Grant reporting & deliverables	\$50,000-60,000	Director with the support of staff, partners & UWBA to help identify opportunities	FY24-27
Expand CalFresh enrollments	Expand collaboration with Food Bank to train staff on CalFresh Launch outreach campaign	\$5,000	Director & Coordinators with support of local Food Bank.	FY24
Increased AB132 funding	Participate in any relevant advocacy efforts for this funding	\$15,000 (this will depend on college enrollment)	Chancellor's Office, college leadership & district government relations team	FY24-27

XI. MEASURING OUR PROGRESS (How will you know that progress is being made on your Financial Sustainability Plan? Example: We will meet on a quarterly basis and review how our percentages of revenue streams compare to our Financial Sustainability Plan.)

We will review potential grant and revenue opportunities on a quarterly basis and compare current sources to our ideal revenue model. We will meet annually to evaluate progress on and update this Financial Sustainability Plan. We will also review revenue and spending on a monthly basis to identify trends, gaps and needs.

INSTRUCTIONS

Please complete the SparkPoint program logic model for your center below using the instructions described.

In **“program elements required for all sites”** section, your center should fill out each column of the logic model. All outputs and outcomes should directly relate to program inputs and activities planned for this upcoming fiscal year. Standard regional measures are already pre-populated in each column. No other measures should be added to this section.

In **“site-specific program elements”** section, your center can add in local success metrics that are important measures of program success but don’t fit into the regional metrics. United Way Bay Area will take these local measures of success into consideration when reviewing your program and collaborate with your center to incorporate it into your annual year-end evaluation report. The site-specific measures are optional, and your center would be responsible for data collection.

Below are definitions and instructions for each part of the logic model:

- 1. INPUTS.** Briefly describe the resources and partnerships that will be essential for implementing your program successfully.
- 2. ACTIVITIES.** Briefly describe the activities that your center plans to conduct in this upcoming fiscal year.
- 3. OUTPUTS.** Output measures help us understand how successful the program activities are being implemented. Outputs often include the number of people served but can also include other immediate direct benefits of your program (such as people enrolled in benefits program, number of staff trained, students receiving scholarship grant, students completed education program). Input your best estimate for each output measure for this upcoming fiscal year.
- 4. OUTCOMES.** Outcome measures help us understand the effectiveness and impact of program activities. Outcomes usually include intermediate- or long-term impacts that represent the achievement toward your program goal. Input your best estimate for each output measure for this upcoming fiscal year. For regional outcomes that refer to stages (i.e., Crisis, Vulnerable, Stability, Success, Prosperity), refer to the table below for definitions:

	Crisis	Vulnerable	Stability	Success (or Building Capacity)	Prosperity (or Empowered)
Income	No income	Has income that is less than 75% SSI ¹	At least 75% SSI	At least 85% SSI	At least 100% SSI
Savings	No Savings	2 weeks of savings	1 month savings	2-3 months savings	3+ months saving
Credit	Has very poor credit (<500)	Has poor credit score (500-599) or no credit history	Has fair credit score (600-649)	Has good credit score (650-699)	Has good credit score (700+)
Debt	Has outstanding debt collections, regardless of DTI.	Has very high debt-to-income (DTI) ratio (50+%).	Has high debt-to-income ratio (36-49%).	Has manageable debt-to-income ratio (35% or less) with revolving debt.	Has manageable debt-to-income ratio (35% or less) and no revolving debt.

	INPUTS <i>What resources are used to implement the program?</i>	ACTIVITIES <i>What activities are planned?</i>	OUTPUTS <i>Who was served?</i>	OUTCOMES <i>How successful are the activities in helping clients reach goals?</i>
Program elements required for ALL sites	<ul style="list-style-type: none"> • \$ <u>700,000</u> revenue • Staffing (including lead agency and partner FTEs and volunteers providing services) <ul style="list-style-type: none"> » <u>6</u> # Staff » <u>3</u> # Volunteers 	<ul style="list-style-type: none"> • Provide financial coaching to clients • Provide career coaching to clients • Provide Family-Centered Coaching to clients • Provide direct assistance services to help clients meet basic needs 	<ul style="list-style-type: none"> • <u>300</u> # total individuals served <ul style="list-style-type: none"> » <u>250</u> # participants² » <u>50</u> # clients • <u>30</u> # total individuals served who enroll in or maintain public benefits • <u>70</u> % of clients re-assessed (i.e., total measurable clients³ / total clients) 	<ul style="list-style-type: none"> • <u>60</u> % of measurable clients who reach their own financial goal • <u>70</u> % of measurable clients who achieve 5% positive improvement in any financial category (income, savings, credit, debt) • <u>45</u> % of measurable clients who achieve 30% positive improvement in any financial category (income, savings, credit, debt) • <u>70</u> % of measurable clients who maintain financial status in any category (income, savings, credit, debt) • <u>40</u> % of measurable clients who move out of Crisis and achieve Vulnerable or better • <u>25</u> % of measurable clients who move out of Vulnerable stage and achieve Stability or better • <u>20</u> % of measurable clients who move out of Stability stage and achieve Success or better • <u>15</u> % of measurable clients who move out of Success stage and achieve Prosperity or better
Site-specific program elements (OPTIONAL)	<ul style="list-style-type: none"> • On-campus and off-campus partnerships (credit unions, Food Bank, childcare agency, VITA free-tax help) 	<ul style="list-style-type: none"> • Financial coaching and education • Rental Assistance • Food Distribution • CalFresh Outreach • Free tax-help for students • Financial workshops • Staff attend training on the Family-Centered Coaching model 	<ul style="list-style-type: none"> • 8 financial workshops provided • 4 staff trained on Family-Centered Coaching model • 1,000 students provided food assistance • 20 students signed up for CalFresh • 200 students assisted with taxes 	<ul style="list-style-type: none"> • 1-2 client impact stories or quotes • 75% of clients participating in financial workshops surveyed feel they learned new information about income supports, education & workforce or financial empowerment. • 50 clients are referred to financial, career, Family-Centered, or basic needs services. • 25 clients reach their own financial goals

² Participants include individuals who are using only non-coaching services (such as food pantries and other basic needs services).

³ A measurable client is any coaching client who received a baseline assessment and follow-up assessment.

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:

CLIENT JOURNEY

Use this activity to sketch a student's experiences with SparkPoint from entry to completion. This activity outlines how a student learns about SparkPoint, when and how they decide to connect with SparkPoint, how they access student services and their completion of programming.

OUTREACH
How does a student become aware of SparkPoint?
Students hear about SparkPoint offering rental assistance from a variety of sources, including staff and counselors from the Dream Center, EOPS, Veterans Services, and CalWorks.

OUTREACH
How does a student learn more about SparkPoint?
Off-campus potential clients access rental assistance by phone, email or partner referrals. Students continue to hear about rental assistance from counselors at the Dream Center, EOPS, Veterans Services, and CalWorks. A Dream Center staff member refers students to the SparkPoint Center. SparkPoint coaches reach out to the referred student.

CONTEMPLATION
How does a student decide to use SparkPoint services?
Interested individuals meet with SparkPoint Coaches and learn more about the process and documentation needed to access rental assistance and determine if they can meet the requirements.

CONNECTION
How does a student connect to SparkPoint services?
SparkPoint Coaches work directly with clients to collect or produce required documentation. SparkPoint Coaches make referrals to the direct service agency partner and send required documentation to them to process rent checks.

ACCESS
How does a student access SparkPoint services?
Once applications are approved, clients or their landlords (depending on the case) receive rental assistance from the direct service partner agency.

ACCESS
How does a student continue or complete SparkPoint Programming?
Clients continue meeting with SparkPoint Coaches to continue one-on-one coaching to support long-term goals. Clients access services including credit building, savings counseling, food pantry access and career coaching. Clients can continue working with their SparkPoint Coaches for the next 6 to 24 months or until they achieve their financial goals.

RE-ENGAGEMENT
How does a student access additional SparkPoint services after completion?
Once students successfully transfer or complete their time at the college, they can continue to meet with their coaches or access services as needed. Clients can also reengage with SparkPoint if the need arises in the future.

Things to consider:

- Create multiple Client Journey Maps for different populations as they interact differently with services.
- Continuously update this as the process changes with technology, staff turnover, and demographic changes.
- As many people access SparkPoint through basic needs services, determine how this may be different from accessing other services.
- Design a journey that allows clients to move smoothly through the program to access multiple services without stigma.
- Account for every touchpoint where the client interacts with your Center.
- Learn from both negative and positive experiences when making decisions.

Download the activity sheet here!