# Implementation Plan Template

INSTITUTION NAME

PREPARED BY

DATE

SPARK POINT®

Powered by:

United Way

UNITED WAY BAY AREA

## 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:**

## COMMITTEE MEMBERS

**PLANNING LEAD**

| Name | Agency | Title/Role | Advisory/Steering Committee | Email |
|---|---|---|---|---|
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**PLANNING COMMITTEE MEMBERS**

| Name | Agency | Title/Role | Advisory/Steering Committee | Email |
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## DECISION MAKING STRUCTURE

**Define how decisions will be made:**

## VISION STATEMENT

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

## PRIORITY POPULATION

**Define your priority population:**

## SERVICES

SparkPoint _____________________ will provide __________ students and local community residents with the following services:

| Financial | Career & Education | Basic Needs |
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**For the subcategories below, list a description of the services offered:**

**FINANCIAL COACHING**

## BENEFITS ENROLLMENT & ADVOCACY

## STRATEGY FOR REFERRALS

| Provider | Services |
| --- | --- |
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## PARTNER LIST

| Partner Name | Description of Program/Agency | Description of Relationship & Services Offered | Contact & Agreement/ MOU Status |
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**PARTNERSHIP AGREEMENTS**

## SERVICE INTEGRATION

| Goal | How?<br>Strategy completed 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. | | |
| 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). | | |
| Use a standardized vocabulary/common language when referring to processes to clients, internal partners, and external public. | | |
| Have a clear referral system in place for clients to access additional services. | | |
| Share a data system and routinely use this system to make decisions concerning center performance, strategy and/or clients. | | |
| Communicate about decisions and have a unified and clear decision-making process that is shared across partners/programs. | | |

| | | |
|---|---|---|
| Have a shared logic model and goals and share progress and accountability equally with partner agencies. | | |
| Responsibilities reflect a service-oriented approach where individual staff roles and responsibilities crossover what were previously separate jobs/ functions. | | |
| 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. | | |
| Take responsibility for ongoing casework of a client that spans across traditional program groupings (e.g., income support, workforce and benefits programs). | | |
| Hold continual training and development at regular intervals. Trainings are structured to meet the changing needs of staff. | | |
| Have a streamlined intake and assessment process across multiple programs and regularly utilize the information to make decisions about clients. | | |

## STAFFING

| Position | Job Responsibilities | Start Date & FTE | Contact Information |
|---|---|---|---|
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## 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 | | | |
| HR, FACILITIES, AND IT | | | |
| EMPLOYEE | | | |

## HIRING TIMELINE

**12+** MONTHS PRIOR TO LAUNCH

**9** MONTHS PRIOR TO LAUNCH

**6** MONTHS PRIOR TO LAUNCH

**3** MONTHS PRIOR TO LAUNCH

CENTER LAUNCHES!

## SCHEDULING

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

| | Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|---|
| Morning | | | | | | | |
| Afternoon | | | | | | | |
| Evening | | | | | | | |

## LOCATION

SparkPoint Center Address: ______________________

Phone Number: ______________________

E-Mail: ______________________

## MARKETING AND OUTREACH

**Define Marketing and Outreach Strategy:**

## BUDGET PLAN

| REVENUE | YEAR 1 | YEAR 2 | YEAR 3 |
| --- | --- | --- | --- |
| Government grants | | | |
| Institutional funding | | | |
| Foundation grants | | | |
| Individual donations | | | |
| Earned income | | | |
| Other revenue | | | |
| **TOTAL REVENUE** | | | |

| EXPENSES | | | |
| --- | --- | --- | --- |
| **PERSONNEL COSTS** | | | |
| Staff salaries and wages | | | |
| Benefits | | | |
| **PROFESSIONAL FEES/CONTRACTS** | | | |
| Consultants/professional fees | | | |
| Subcontracts with partner agencies | | | |
| **PROGRAM AND OPERATING COSTS** | | | |
| Program supplies | | | |
| Student incentives | | | |
| IT equipment/software | | | |
| Cell phone & internet | | | |
| Data collection/evaluation | | | |
| Postage and shipping | | | |
| Rent and occupancy | | | |
| Printing and publications | | | |
| Marketing and outreach | | | |
| Travel | | | |
| Conferences, meetings, workshops, training | | | |
| Interest | | | |
| Depreciation, depletion, etc. | | | |
| Admin and other expenses not covered above | | | |
| **TOTAL EXPENSES** | | | |

## 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?)

**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?)

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

**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?

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

**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

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

**VIII. IDEAL/INTENDED REVENUE MODEL IN THE NEXT 3 YEARS** (List or insert a chart illustrating ideal revenue categories three years form 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?)

**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.)

**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 |
|---|---|---|---|---|
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**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)

## 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. |

1 SSI stands for the Self-Sufficiency Income. United Way Bay Area's core outcome metrics utilize the success framework modeled after the Arizona Self-Sufficiency Matrix (https://www.hudexchange.info/resource/1562/self-sufficiency-matrix-using-hmis-to-benchmark-progress-sample/).

| | **INPUTS**<br>*What resources are used to implement the program?* | **ACTIVITIES**<br>*What activities are planned?* | **OUTPUTS**<br>*Who was served?* | **OUTCOMES**<br>*How successful are the activities in helping clients reach goals?* |
|---|---|---|---|---|
| **Program elements required for ALL sites** | • $_____________ revenue<br>• Staffing (including lead agency and partner FTEs and volunteers providing services)<br>» ______# Staff<br>» ______# Volunteers | • Provide financial coaching to clients<br>• Provide career coaching to clients<br>• Provide Family-Centered Coaching to clients<br>• Provide direct assistance services to help clients meet basic needs | • _____ # total individuals served<br>» _____ # participants[2]<br>» _____ # clients<br>• _____ # parent clients served<br>• _____ # student clients served<br>• _____ # total individuals served who enroll in or maintain public benefits<br>• _____% of clients re-assessed (i.e., total measurable clients[3] / total clients) | • _____% of measurable clients who reach their own financial goal<br>• _____% of measurable clients who achieve 5% positive improvement in any financial category (income, savings, credit, debt)<br>• _____% of measurable clients who achieve 30% positive improvement in any financial category (income, savings, credit, debt)<br>• _____% of measurable clients who maintain financial status in any category (income, savings, credit, debt)<br>• _____% of measurable clients who move out of Crisis and achieve Vulnerable or better<br>• _____% of measurable clients who move out of Vulnerable stage and achieve Stability or better<br>• _____% of measurable clients who move out of Stability stage and achieve Success or better<br>• _____% of measurable clients who move out of Success stage and achieve Prosperity or better |
| **Site-specific program elements**<br><br>**(OPTIONAL)** | | | | |

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:**

## CLIENT JOURNEY

Put a picture of your finalized Client Journey Map here: