

PATHWAYS TO EXCELLENCE VIDEO



**"START DREAMING
AND DREAM
BIG"**

Newcap

Advocating. Believing. Achieving.

EVERY JOURNEY BEGINS WITH A SINGLE STEP



1

2019

Searching for a delivery model that fits our mission and values

2

2020

NCAP's Whole Family Approach Community of Practice

3

2021

Changing our Mindset
Gathering Data
Building Partnerships
Developing the Toolkit

4

2022

Year 1 Success
Coaching Pilot

5

2023

Year 2 Success
Coaching Pilot
Expansion
Restructuring our Roles

6

PRESENT

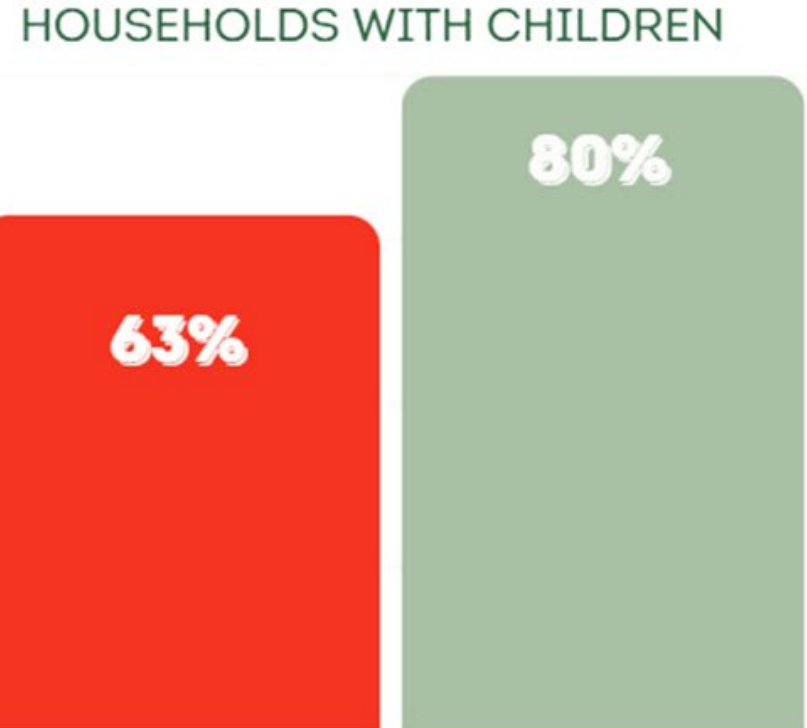
Full Implementation
A Plan for Sustainability





SUCCESS COACHING PILOT SUMMARY

Progress for the 12 months
to December 31, 2022



KEY SUCCESSES

- 126 households enrolled in success coaching
- 760 households enrolled in light coaching

41% of households in success coaching increased their savings	40% of households in success coaching were unemployed and obtained employment
48% of households in success coaching opened a savings account	21% obtained employment at less than a living wage
18% increase in employment and training enrollments	19% obtained employment at a living wage or higher

Newcap, Inc.



Lessons Learned



01

Vision and Theory of Change for the Whole Family Approach service delivery model.

02

We need a database that works for us.

03

We need to restructure our roles and responsibilities.



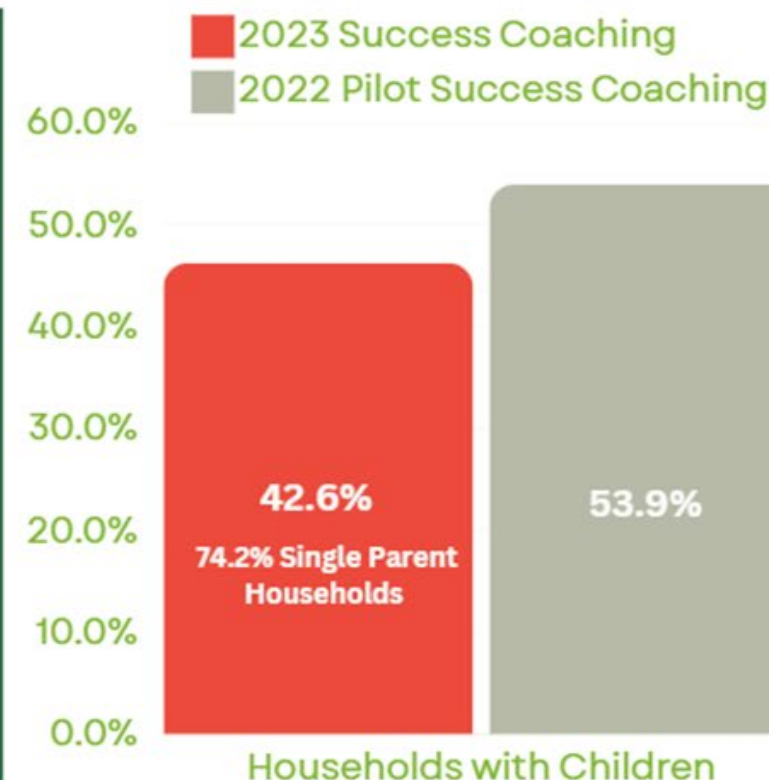
AT A GLANCE

Progress for the 12 months to December 31, 2023



2023 **486** Households enrolled in Success Coaching
Light Coaching was not offered in 2023

2022 **126** Households enrolled in success coaching pilot



KEY SUCCESSES

386% Increase in Success Coaching enrollments from 2022 to 2023

- 28% of unemployed participants obtained employment
- 44% of employed participants opened a savings account or increased savings
- 19.5% of parents report increased leadership skills, social network, skills, knowledge, or abilities to improve community
- 27% of participants reported improved mental well-being
- 19% of participants reported improved physical well-being
- 46.7% of parents improved skills related to the role of caregiver or increased sensitivity and responsiveness in the interactions with their children

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Lessons Learned

The logo for the Whole Family Approach features a stylized sunburst above the word "WHOLE" in blue, with a red heart shape integrated into the letter "O". Below "WHOLE" is the phrase "FAMILY APPROACH" in a smaller, blue, sans-serif font.

01

*The Whole Family
Approach
is how we do everything,
not something we do.*

02

Wrapping Participants in
Services is Imperative

03

Providing Success
Coaching is Dependent
on Funding

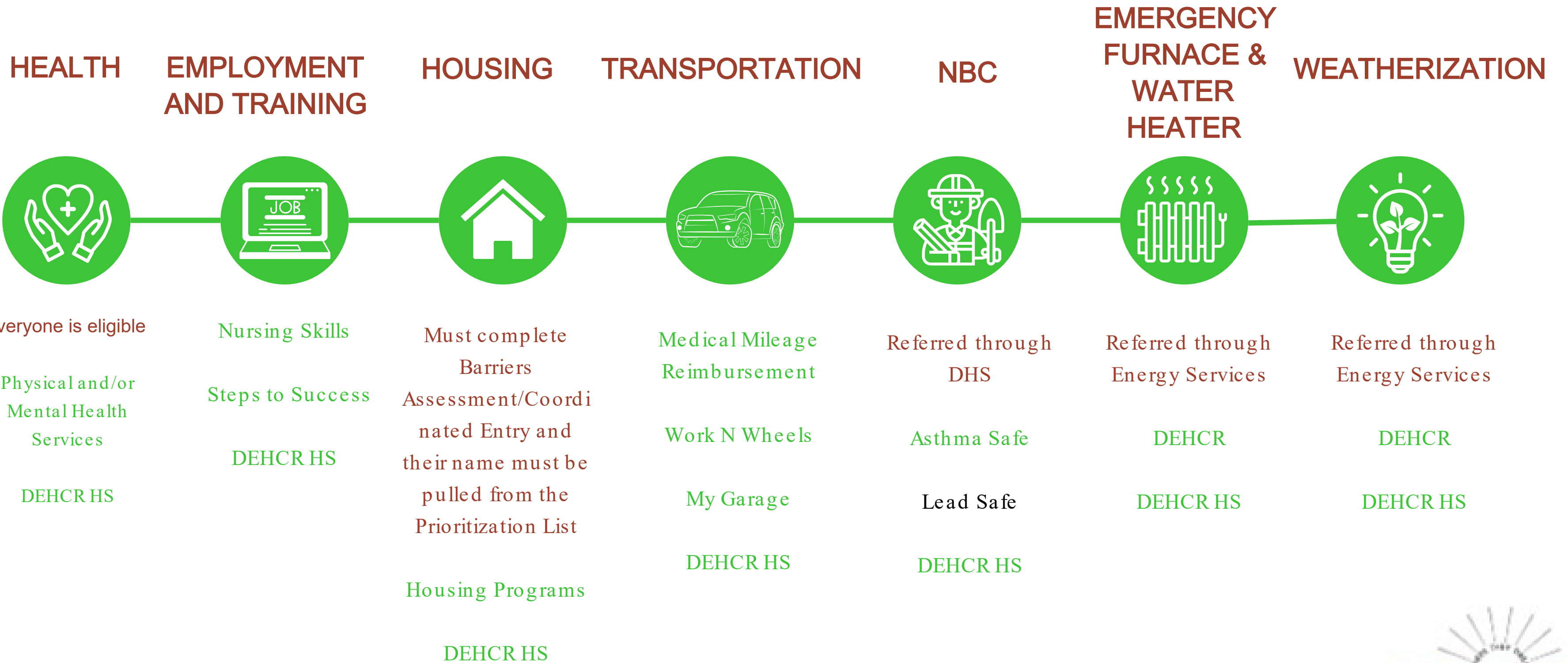
MINDSET

- Light coaching is provided by every Newcap team member regardless of job title. We all provide services using coaching skills.
- We use care teams to make participants' journeys seamless.
- We provide services using The Whole Family Approach and Family Centered Coaching and Community Health Worker skills.
- The Whole Family Approach is how we do everything not something we do. It is not Success Coaching.



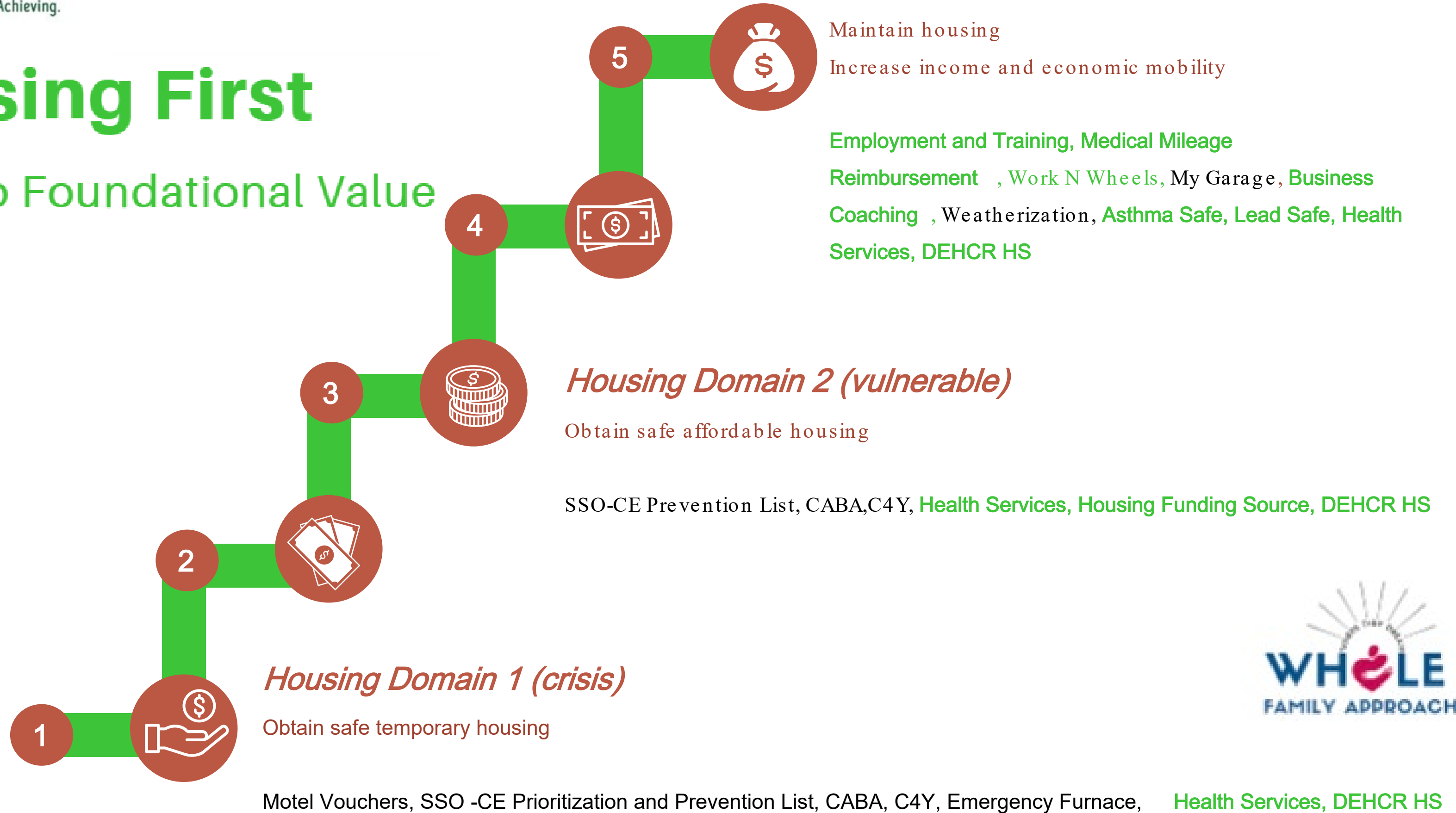
NO WRONG DOOR

Connection to services happens at every touchpoint



Housing First

Newcap Foundational Value



Housing Domain 3 to 4 to 5 (safe, building capacity, thriving)

Housing Domain 2 (vulnerable)

Housing Domain 1 (crisis)



Beyond Housing

Collective Newcap Goals

Our Why = Mission

01

*Obtain Safe Affordable
Housing*

02

Maintain Housing

03

Increase Income



Enhanced Services

Building Social Capital

= Thriving

01

Weekly Case Conferencing

02

Internal and External Care
Teams

03

Workshops, Support Groups,
Fun Events, Community
Awareness

04

Whole Family Guiding
Coalitions, Family Advisory
Board





NEWCAP SERVICE PROVISION METRICS

Below are the services and documentation needed for every Newcap participant. The Newcap team member at first touchpoint is responsible for providing services and obtaining documentation.

- Demographics are up to date
- Benefits worksheet
- Income Snapshot
- Bio and first 5 domains of the 20 domain matrix
- Goal Plan with SMART goals and SMART action items
- Budget
- Case notes
- Documentation that Presumptive Eligibility has been determined in the last 90 days
 - Internal referrals must be done in EmpowOR
 - External referrals must be documented in case notes
 - Declined referrals must be documented in case notes



BIO AND MATRIX

Bio:

- Contains info that most likely will not change in 90 days.
- Contains info that other care team members need to know if you win the lottery.
- Contains info that will prevent the participant from having to retell traumatic experiences.

Matrix

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Family-Centered Coaching

CommDomain	1 (In Crisis)	2 (Vulnerable)	3 (Safe)	4 (Building Capacity)	5 (Thriving)
Food	I/we or my family do not have enough food to last today and we do not have enough money to buy food.	I/we regularly miss a meal because of a lack of money to buy food.	I/we get enough food stamps or outside help to meet our food needs.	I/we can provide three meals a day from our income.	I/we are able to buy the food we need without food stamps or other people's help, and we can eat out when we choose to do so.
Housing	I/we have no place to stay, or have a 14 day eviction or utility shut off notice. I/we are living in an unsafe home.	I/we do not have a permanent place or temporarily stay with others, and often must move to a different place.	I/we are renting a home with the help of either temporary or permanent assistance.	I/we are in rental housing that is safe and affordable with no rental assistance.	I/we own or are buying a safe home or renting a home of my/our choice.
Employment/Income	I/we are not and not receiving unemployment benefits or have disabilities that interfere with ability to gain employment.	I/we are seeking employment and or working part-time or have 2 or more jobs or receiving SSI.	I/we are living on a fixed income or under employed or employed without benefits.	I/we are employed 32+ hours a week with limited benefits.	I/we are employed 32+hours a week with benefits and opportunities for advancement.
Mental Health	Danger to self or others; suicidal thoughts; experiencing severe difficulty in day-to-day life due to psychological problems.	Recurrent mental health symptoms that may affect behavior, but not a danger to self/others; persistent problems with functioning due to mental health symptoms.	Mild symptoms may be present but are transient; only moderate difficulty in functioning due to mental health problems.	Minimal symptoms that are expected responses to life stressors; only slight impairment in functioning.	Symptoms are absent or rare; good or superior functioning in a wide range of activities; no more than everyday problems or concerns.
Physical Health	Acute or chronic symptoms affecting housing, employment, social interactions, etc.	Sometimes or periodically has acute or chronic symptoms affecting housing, employment, social interactions, etc.	Rarely has acute or chronic symptoms affecting housing, employment, social interactions, etc.	Asymptomatic; condition controlled by services and/or medication	No identified disability.

Domain	1 (In Crisis)	2 (Vulnerable)	3 (Safe)	4 (Building Capacity)	5 (Thriving)
Energy/ Water/Utilities	My utilities are shut off or I/we have a shut off notice.	My utility bills are high and/or past due with notice of termination within the last six months.	My utilities are current and/or I am receiving energy assistance.	My utility bills are current with a history of late payments.	My utility bills are current and paid on time without a history of late payments.
Transportation	I/we have no means of transportation other than walking.	I/we rely on friends or public transportation is not always reliable, or I/we have no valid license.	I/we are able to get transportation that meets my needs.	I/we have at least one reliable vehicle available.	I/we have enough vehicles to meet household transportation needs.
Health Insurance	I/we have no health insurance coverage	All members of household do not have health insurance or have limited coverage	I/we are covered by health insurance at high cost or enrolled in (Medicaid).	I/we covered by health insurance at affordable cost.	My employer pays for health insurance with low to no cost, out of pocket and prescriptions are covered or enrolled on Medicare
Child Care (All children in family-if childcare is not available for one child or not affordable for even one of the children then answer accordingly)	I/we cannot obtain or afford childcare, and this is making it hard to keep employment or enroll in education or training classes.	I/we have childcare provided by friends or family.	I/we receive financial help to enroll my child in safe childcare.	I/we are able to pay for safe, affordable satisfactory childcare that meets my needs.	I/we have childcare provide in a licensed day care or early child education center that is affordable and easy to get to.
Child and Youth Development	My child has been identified with a behavior/developmental. Issue and is not receiving assistance.	Child has identified behavior or developmental issues and is receiving assistance and or child is failing more than one class or dropped out of school.	Child has no identified behavior diagnosis or children with identified behavior issue has a 504 plan	Child has passing scores and is meeting all development milestones	Child is exceeding development or academic milestones.

Domain	1 (In Crisis)	2 (Vulnerable)	3 (Safe)	4 (Building Capacity)	5 (Thriving)
Home/Family Environment	I/we have multiple sources of stress creating unsafe situations, and/or chaos and /or instability for our family.	I/we have a particular source of stress that causes varying safety and/or stability issues for our family.	I/we provide a consistent, safe, and stable home environment with positive relationships for our family.	I/we have the capacity to weather stressful situations and provide a consistent, safe, and stable home environment with positive relationships for our family.	I/we weather stressful situations and maintain family relationships that protect the children and boost all family members' well-being, emotional support, and confidence.
Education/Job Skills	I/we do not have a High School Diploma or a GED and no marketable job skills.	I/we have a HS Diploma or GED but lack marketable job skills.	I/we have a HS Diploma or GED and enrolled in post-secondary education.	I/we have an associate degree or vocational training or certification program.	My/our current education, certifications, or job skill sets are sustaining.
Financial Management	I/we regularly miss paying one or more monthly bills or I am receiving calls from a collection agency.	I/we are paying current bills but have no savings and are not able to pay off past debt or credit card.	I/we are paying current bills and the minimum required payments on existing debt/credit.	I/we are paying current bills and making regular payments to reduce debt and regularly paying into savings.	I/we have access to credit and loans at competitive market rates and a clean credit history.
Credit Building	The only credit I can get is high interest loans or credit cards or I have a bankruptcy, foreclosure, loan default in the past 7 years.	I/we do not have and/or are unable to obtain a bank loan or qualify for a credit card.	I/we are able to obtain a loan with a cosigner or secure credit card.	I/we are able to get a loan on my own and secure a credit card.	I/we have access to credit and loans at competitive market rates, and a clean credit history.
Asset Building	I/we have no saving, no equity in the home.	I/we have a savings account but make irregular payments when I can.	I/we make regular payments into a saving account, maintain a savings balance of at least \$500 and or ate buying a house with existing mortgage.	I/we own a home with mortgage and maintain savings of \$500.	I/we own a home and are current on mortgage payments and have a retirement fund (not SSA).

Domain	1 (In Crisis)	2 (Vulnerable)	3 (Safe)	4 (Building Capacity)	5 (Thriving)
Legal	I/we have current outstating's tickets, warrants or pending legal action or non-compliance with probation or parole.	I/we have current charges, or a trial pending.	I/we are fully compliant with probation/parole terms and have applied for expungement.	I/we have successfully completed probation/parole within the past 12 months. No new charges filed and expungement of criminal charges	I/we have no criminal justice involvement.
Support/Social Networks	I/we have no family or friends to call on for support, help, or assistance.	My/our friends are accessible but are unreliable and show only occasional support.	I/we have at least 3 friends or family who are reliable during emergencies and we can develop new relationships.	I/we have at least 5 friends or family who are reliable and supportive in many ways.	I/we have over 5 friends or family who are reliable, supportive, and available whenever needed and we maintain relationships with each other.
Substance Abuse	Meets criteria for severe abuse/dependence; resulting problems so severe that institutional living or hospitalization may be necessary.	Meets criteria for dependence; preoccupation with use and/or obtaining drugs/alcohol; withdrawal or withdrawal avoidance behaviors evident; use results in avoidance of neglect of essential life activities.	Use within last 6 months; evidence of persistent or recurrent social, occupational, emotional, or physical problems related to use (such as disruptive behavior or housing problems); problems have persisted for at least one month.	Client has used during last 6 months, but no evidence of persistent or recurrent social, occupational, emotional, or physical problems related to use; no evidence of recurrent dangerous use.	No drug use/alcohol abuse in the last 6 months.

Family-Centered Coaching

Domain	1 (In Crisis)	2 (Vulnerable)	3 (Safe)	4 (Building Capacity)	5 (Thriving)
Safety	Home or residence is not safe; immediate level of lethality is extremely high; possible CPS involvement	Safety is threatened/temporary protection is available; level of lethality is high.		Environment is safe, however, future of such is uncertain; safety planning is important.	The environment is apparently safe and stable.
Community Involvement	I/we feel unsafe or unwelcome in my community.	I/we do not know what opportunities exist and/or I do not have the means for my family to participate in community events and activities.	I/we can participate a limited amount of community events and feel safe and welcome.	I/we are aware of opportunities for my family members to participate and feel welcome and encourage them to do the so whenever we can.	My family participates in community events and activities.

I, _____ give NEWCAP, Inc. permission to make inquiries and release information obtained from me (about myself and my family) to:

Agency _____ Attention: _____
Address _____ Phone/Email: _____

Two-way Release

I also give permission for the above-mentioned Agency/Worker to provide NEWCAP with information about me and/or my family.

I also exempt NEWCAP, Inc. from any litigation or liability resulting from the release of such information.

Furthermore, I give permission for the following specific information to be provided to NEWCAP about my child _____ . (Please check all that apply):

- My child age 0 to 5 demonstrated improved emergent literacy skills in the past 90 days.
- My child age 0 to 5 demonstrated skills for school readiness in the past 90 days.
- My child or youth demonstrated improved positive approaches toward learning, including improved attention skills in the past 90 days. Please check appropriate grade level below.
 - Early Childhood Education (ages 0-5).*
 - 1st grade-8th grade.*
 - 9th grade-12th grade.*
- My child or youth is achieving at basic grade level (academic, social, and other school success skills). Please check the appropriate grade level below.
 - Early Childhood Education (ages 0-5).*
 - 1st grade-8th grade.*
 - 9th grade-12th grade.*

-
- This release is valid until participant graduates from the coaching program.
 - This release expires when the information below has been released.
 - The information released/received is only for the purpose of determining eligibility, providing services, and providing case management. Unless identified below, this is a general information release.

I am authorizing only a limited release/receipt of information. Only the information listed below is authorized for release/receipt:

Participant Signature _____ Date _____

Coach _____ Date _____

PRESUMPTIVE ELIGIBILITY

Gather Information:

1. Where are you located?
2. Are you safe? **If no, refer to DV agency**
3. Where did you stay last night?
4. How long can you stay there?
5. Update or Input Demographics in EmpowOR. **Do NOT send to website to complete intake.**
6. Income Snapshot
7. Benefits Worksheet

Offer all services participant is eligible for using the Presumptive Eligibility tool under the resources tab on NewcapNet.

1. Make internal referrals in EmpowOR
2. Document external referrals in case notes.
3. Document declined services in case notes.

Goal



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GOALS

SMART GOALS ARE OBJECTIVES THAT ARE CLEAR, TRACKABLE, AND ACHIEVABLE, AND ARE DEFINED BY FIVE QUALITIES:

Specific

The goal should include details of what you want to accomplish.

Measurable

You should be able to measure your progress and determine if you've accomplished the goal.

Achievable

The goal should be realistic and possible to complete within the set time frame. You should have the right skills and resources to accomplish the goal.

Relevant

The goal should align with your values, long-term goals, and the goals of your team or organization.

Time-bound

The goal should be set within an appropriate time frame, with a deadline for accomplishing it.

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GOAL PLANS

- Must include action items.
- Action items must be attainable in the time between sessions.
- Action items must be reviewed at each session.
- New action items must be added at each session.
 - If an action item was **NOT** completed use the notes section to indicate that the participant will repeat action item. Be sure to indicate original action item date.

All notes in the goal plan must be dated and include your name and title.

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ENTERING SERVICES AND OUTCOMES

- Services are entered every time you work with a participant
- Outcomes are entered as participants achieve them
- Outcomes must be entered in each template
- The same outcome may be achieved multiple times in a year

Exception: 90/180 day outcomes only achieved once per year

- At the 90 day interval, when you are completing the matrix and youth outcomes ROI, be sure to enter multiple outcomes
- Upward movement on the matrix = outcome achieved
- Start over recording outcomes each new calendar year

Universal Outcomes:

1. Obtain housing
2. Maintain housing (i.e. Section 8)
3. Decreased reliance on public subsidies (exit plan)
4. Increased social network and working to improve community (crisis plan)
5. Met basic needs 90/180 days
6. Increase financial well being (increase income: i.e. creating and reviewing budget, open savings account, put money in savings, receiving financial assistance, gain employment, credential, promotion, apply for and receive SSI or SSDI, etc.)
7. Increase mental well being
8. Increase physical well being
9. Increased sensitivity and responsiveness of caregivers to children's needs
10. Parents/Caretakers who improved home environment
11. Chronic illness and maintained an independent living situation.
12. 65 or older and maintained an independent living situation.
13. Disabled and maintained an independent living situation.

Service Delivery Logic

AKA Cheat Sheet Model

ACTIVITY	(Possible) SERVICES	DOCUMENTATION	(Possible) OUTCOMES
Presumptive Eligibility	<u>SERVICES ACROSS MULTIPLE DOMAINS (SRV7)</u> eligibility determination referrals case management	Case Notes Income Snapshot Benefits Worksheet Referrals in EmpowOR	NONE
First Matrix	<u>SERVICES ACROSS MULTIPLE DOMAINS (SRV7)</u> eligibility determination referrals emergency clothing mediation/customer advocacy interventions transportation services <u>SOCIAL/BEHAVIORAL DEVELOPMENT(SRV 6)</u> kits/boxes Coaching Session	Case Notes 20 Domain Matrix Product given	NONE
Youth Outcomes ROI (participants with children) *Send ROI with youth outcomes to teacher, school social worker, Head Start advocate, etc. or ask parent to take to parent/teacher conferences as part of	<u>SERVICES ACROSS MULTIPLE DOMAINS (SRV7)</u> case management <u>SOCIAL/BEHAVIORAL DEVELOPMENT(SRV 6)</u> Coaching Session	Case Notes Release of Information (ROI) school/child care reports	FNPI 2a The number of children (0 to 5) who demonstrated improved emergent literacy skills. FNPI 2b The number of children (0 to 5) who demonstrated skills for school readiness. FNPI 2c The number of children and youth who demonstrated improved positive approaches toward learning, including improved attention skills <i>FNPI 2c.1 Early Childhood Education (ages 0-5).</i> <i>FNPI 2c.2 1st grade-8th grade</i> FNPI 2c.3 9th grade-12th grade school success skills) <i>FNPI 2d.1 Early Childhood Education (ages 0-5).</i>

Service Delivery Logic Model

AKA Cheat Sheet

ACTIVITY	(Possible) SERVICES	DOCUMENTATION	(Possible) OUTCOMES
<p>Matrix at 90, 180 days, etc. *do NOT edit original matrix, use new assessment*</p>	<p><u>SOCIAL/BEHAVIORAL DEVELOPMENT(SRV 6)</u> Coaching Session</p>	<p>Case Notes 20 Domain Matrix</p>	<p>FNPI 1e The number of unemployed adults who obtained employment (with a living wage or higher). living wage or higher). FNPI 1g The number of unemployed adults who obtained and maintained employment for at least 180 days (with a living wage or higher). FNPI 1h participants who report increased income or benefits <i>FNPI 1h.1 participants who received a raise</i> <i>FNPI 1h.2 participants who increased hours worked</i> <i>FNPI 1h.3 participants who have improved benefits</i> FNPI 3a The number of individuals who achieved and maintained capacity to meet basic needs for 90 days FNPI 3b The number of individuals who achieved and maintained capacity to meet basic needs for 180 days FNPI 3d The number of individuals who increased their savings. FNPI 3e The number of individuals who used their savings to purchase an asset. FNPI 3f The number of individuals who purchased a home. FNPI 3g The number of individuals who improved their credit scores. FNPI 3h The number of individuals who increased their net worth. well-being FNPI 3z participants who reduced reliance on public subsidies FNPI 5b The number of individuals who demonstrated improved physical health and well-being. FNPI 5c The number of individuals who demonstrated improved mental and behavioral health and well-being. The number of individuals who increased financial well being</p>
<p>Youth Outcomes ROI at 90, 180 days, etc. (participants with children) *Send ROI with youth outcomes to teacher, school social worker, Head Start advocate, etc. or ask parent to take to parent/teacher conferences as part of matrix*</p>	<p><u>SOCIAL/BEHAVIORAL DEVELOPMENT(SRV 6)</u> Coaching Session mediation/customer advocacy interventions</p>	<p>Case notes Release of Information (ROI) school/child care reports</p>	<p>FNPI 2a The number of children (0 to 5) who demonstrated improved emergent literacy skills. FNPI 2b The number of children (0 to 5) who demonstrated skills for school readiness. FNPI 2c The number of children and youth who demonstrated improved positive approaches toward learning, including improved attention skills <i>FNPI 2c.1 Early Childhood Education (ages 0-5).</i> <i>FNPI 2c.2 1st grade-8th grade</i> <i>FNPI 2c.3 9th grade-12th grade</i> school success skills) <i>FNPI 2d.1 Early Childhood Education (ages 0-5).</i> <i>FNPI 2d.2 1st grade-8th grade</i> <i>FNPI 2d.3 9th grade-12th grade</i></p>

Service Delivery Logic Model

AKA Cheat Sheet

ACTIVITY	(Possible) SERVICES	DOCUMENTATION	(Possible) OUTCOMES
Participant is part of the Savings Account Incentive Pilot	<u>INCOME AND ASSET BUILDING (SRV 3)</u> Financial Coaching	Case notes Participant's data updated on Savings Account Spreadsheet	FNPI 3c The number of individuals who opened a savings account or IDA FNPI 3d The number of individuals who increased their savings.
	<u>HEALTH & SOCIAL/BEHAVIORAL DEVELOPMENT (SRV 5)</u> incentives	incentive given form	
Parenting Goal Plan	<u>EDUCATION AND COGNITIVE DEVELOPMENT (SRV 2)</u> parenting supports school supplies behavior improvement plan college applications textbooks computers home visit	Case notes Goal Plan Product Given	FNPI 2e The number of parents/caregivers who improved their home environments. FNPI 5d The number of individuals who improved skills related to the adult role of parents/ caregivers. FNPI 5e The number of parents/caregivers who demonstrated increased sensitivity and responsiveness in their interactions with their children.
	<u>HEALTH & SOCIAL/BEHAVIORAL DEVELOPMENT (SRV 5)</u> life skills coaching wellness classes		
	<u>INCOME AND ASSET BUILDING (SRV 3)</u> Financial Coaching	Case Notes Income Snapshot Benefits Worksheet	FNPI 3a The number of individuals who achieved and maintained capacity to meet basic needs for 90 days FNPI 3b The number of individuals who achieved and maintained capacity to meet basic needs for 180 days. The number of individuals who increase financial well being
Creating or reviewing a budget	<u>HEALTH & SOCIAL/BEHAVIORAL DEVELOPMENT (SRV 5)</u> life skills coaching	Budget	

Service Delivery Logic Model

AKA Cheat Sheet

ACTIVITY	(Possible) SERVICES	DOCUMENTATION	(Possible) OUTCOMES
Life Skills Goals Plan	<u>HEALTH & SOCIAL/BEHAVIORAL DEVELOPMENT (SRV 5)</u> life skills coaching wellness classes skills classes kit/boxes incentives	Registration/Attendance Certificate of completion Survey Incentive form Product Given Case notes Goal Plan	growing food). FNPI 5b The number of individuals who demonstrated improved physical health and well-being. FNPI 5c The number of individuals who demonstrated improved mental and behavioral health and well-being. FNPI 5f The number of seniors (65+) who maintained an independent living situation. FNPI 5g The number of individuals with disabilities who maintained an independent living situation. FNPI 5h The number of individuals with a chronic illness who maintained an independent living situation.
	<u>EDUCATION AND COGNITIVE DEVELOPMENT (SRV 2)</u> home visit		
Education/Cognitive Development Goal Plan	<u>EDUCATION AND COGNITIVE DEVELOPMENT (SRV 2)</u> parenting supports school supplies behavior improvement plan college applications	Registration/Attendance Certificate of completion survey	FNPI 2f The number of adults who demonstrated improved basic education. FNPI 2g The number of individuals who obtained a high school diploma and/or obtained an equivalency certificate FNPI 2h The number of individuals who obtained a recognized credential, certificate, or degree relating to the achievement of educational or vocational skills. FNPI 2i The number of individuals who obtained an Associate's degree. FNPI 1h The number of employed participants in a career-advancement related program who entered or transitioned into a position that provided increased income and/or benefits.
	textbooks computers home visit	Product Given Case notes Goal Plan	<i>FNPI 1h.1</i> Of the above, the number of employed participants who increased income from employment through wage or salary amount increase. <i>FNPI 1h.3</i> Of the above, the number of employed participants who increased benefits related to employment.
	<u>HEALTH & SOCIAL/BEHAVIORAL DEVELOPMENT (SRV 5)</u> life skills coaching skills classes kit/boxes		

Service Delivery Logic Model

AKA Cheat Sheet

ACTIVITY	(Possible) SERVICES	DOCUMENTATION	(Possible) OUTCOMES
Employment Goal Plan	<p><u>EMPLOYMENT SERVICES (SRV 1)</u></p> <ul style="list-style-type: none"> Career workshops Job search Coaching Career Coaching Resume development Interview skills training Iterations with employers 	<ul style="list-style-type: none"> Registration/Attendance Certificate of completion survey Case notes Goal Plan Resume 	<p>FNPI 1g The number of unemployed adults who obtained and maintained employment for at least 180 days (with a living wage or higher).</p> <p>FNPI 1e The number of unemployed adults who obtained employment (with a living wage or higher).</p> <p>FNPI 1b The number of unemployed adults who obtained employment (up to a living wage).</p> <p>FNPI 1a The number of unemployed youth who obtained employment to gain skills or income.</p> <p>FNPI 1h The number of employed participants in a career-advancement related program who entered or transitioned into a position that provided increased income and/or benefits.</p> <p><i>FNPI 1h.1 Of the above, the number of employed participants who increased income from employment through wage or salary amount increase.</i></p> <p><i>hours worked increase.</i></p> <p><i>FNPI 1h.3 Of the above, the number of employed participants who increased benefits related to employment.</i></p>
Physical Health Goal Plan	<p><u>HEALTH & SOCIAL/BEHAVIORAL DEVELOPMENT (SRV 5)</u></p> <ul style="list-style-type: none"> life skills coaching wellness classes skills classes kit/boxes incentives health insurance options counseling coaching session exercise/fitness 	<ul style="list-style-type: none"> Certification of Completion Survey Case notes Goal Plan Registration/Attendance ROI 	<p>FNPI 5b The number of individuals who demonstrated improved physical health and well-being.</p>

Service Delivery Logic Model

AKA Cheat Sheet

ACTIVITY	(Possible) SERVICES	DOCUMENTATION	(Possible) OUTCOMES
Mental Health Goal Plan	<u>HEALTH & SOCIAL/BEHAVIORAL DEVELOPMENT (SRV 5)</u> life skills coaching wellness classes skills classes kit/boxes incentives health insurance options counseling coaching session exercise/fitness	Certification of Completion Survey Case notes Goal Plan Registration/Attendance ROI	FNPI 5b The number of individuals who demonstrated <u>improved mental health</u> and well-being.
Income and Asset Building (Savings, Credit Building, Saving to purchase asset, etc.) Goal Plan	<u>INCOME AND ASSET BUILDING (SRV 3)</u> Financial Coaching <u>HEALTH & SOCIAL/BEHAVIORAL DEVELOPMENT (SRV 5)</u> skills classes	Registration/Attendance Certificate of completion Survey Case notes Goal Plan	FNPI 3c The number of individuals who opened a savings account or IDA. FNPI 3d The number of individuals who increased their savings. FNPI 3g The number of individuals who improved their credit scores. FNPI 3h The number of individuals who increased their net worth. FNPI 3i The number of individuals engaged with the Community Action Agency who report improved financial well-being. FNPI 3e The number of individuals who used their savings to purchase an asset. FNPI 3f The number of individuals who purchased a home.
Providing a ride to/from workshops, appointments, classes, etc.	<u>SERVICES ACROSS MULTIPLE DOMAINS (SRV7)</u> transportation services case management	Case notes	
Participant is part of the WFGC, YAC, FAB, Newcap Board, etc.	<u>HEALTH & SOCIAL/BEHAVIORAL DEVELOPMENT (SRV 5)</u> skills classes coaching session	Registration/Attendance Certificate of membership Case notes Survey	FNPI 6a The number of individuals who increased skills, knowledge, and abilities to enable them to work with Community Action to improve conditions in the community. <i>FNPI 6a.1</i> Of the above, the number of Community Action program participants who improved their leadership skills. <i>FNPI 6a.2</i> Of the above, the number of Community Action program participants who improved their social networks. <i>FNPI 6a.3</i> Of the above, the number of Community Action program participants who gained other skills, knowledge and abilities to enhance their ability to engage.

Service Delivery Logic Model

AKA Cheat Sheet

ACTIVITY	(Possible) SERVICES	DOCUMENTATION	(Possible) OUTCOMES
Home Visits and Attempted Home Visits	EDUCATION AND COGNITIVE DEVELOPMENT (SRV 2) home visit	Case notes	
Rent Payment or Utility Payment or Moved into Housing or avoided eviction	HEALTH & SOCIAL/BEHAVIORAL DEVELOPMENT (SRV 5) life skills coaching wellness classes skills classes kit/boxes incentives ACROSS MULTIPLE DOMAINS (SRV 7) case management	Case Notes lease Movement on the Matrix	Increased financial well being Parents who improved home environment Increased responsiveness to and sensitivity of caregivers to children's needs Improved mental health Improved physical health Obtained safe affordable housing Maintained housing 90/180 days
Weatherization or Furnace	ACROSS MULTIPLE DOMAINS (SRV 7) case management	Case Notes Movement on the Matrix	Increased financial well being Parents who improved home environment Increased responsiveness to and sensitivity of caregivers to children's needs Improved mental health Improved physical health Obtained safe affordable housing Maintained housing 90/180 days Home improvements

Choose **ACROSS MULTIPLE DOMAINS (SRV 7) CASE MANAGEMENT** when you provide coaching on multiple topics, for example, when you provide life skills coaching and financial coaching during the same session. If you only review financial goals during the session choose financial coaching. If you spend the entire session building cleaning skills, choose life skills coaching.

KEEP DREAMING

- Braiding and blending of funds
- Building Fee for Service CHW Model
- Creating our first Whole Family Approach community
- Becoming a Platinum Pathways to Excellency Agency



Keep

[Learning](#)
[Ascend at the Aspen Institute](#)

[2Gen
Family Centered Coaching Resources](#)

[Family Centered Coaching Toolkit](#)

[NCAP Whole Family Approach](#)



QUESTIONS