

**Social Services Aligned Measures Framework: Standards of Measurement & Practice**  
*A set of aligned outcomes that social services can track, report on, and explore collectively.*



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## Introduction

Since 2014, United Way has implemented common measures to strengthen data collection efforts, create spaces for peer learning, catalyze collective action, identify measurement challenges, and inform future grant making efforts. The context for our measures fall within the following priorities:

- **Strong Start** – Improve the achievement of key early childhood milestones and the development of young children so that they are prepared for success and beyond, while promoting meaningful parent engagement opportunities.
- **Academic Success** – Provide in-school and out of school programming that bolsters school day activities, helps keep kids on track, or develops life skills in order to improve their academic success.
- **Success After High School** – Ensure students can access post-secondary options, graduate college and workforce ready, and persist to obtaining a degree or credential that will put them on the path to success.
- **Stabilization Services / Basic Needs** – Stabilize people who are facing hunger, eviction, financial crisis, or are recovering from disaster.
- **Career Pathways** – Connecting people to career pathways that lead to good jobs by investing in adult literacy and ESL programs, career development, job training and supportive services.
- **Financial Capability** – Connecting people with safe and affordable financial products and services to establish savings and credit, and to build wealth
- **Primary and Clinical Care** – Aims to prevent illness before it occurs, and lessen the impact of chronic illness for individuals and communities. Treatment and screening of patients is provided in a clinical setting by a doctor, nurse, or dentist.
- **Behavioral and Mental Health** – Promoting well-being by preventing or intervening in mental illness such as depression or anxiety, but also has an aim preventing or intervening in substance abuse, addiction, and trauma.
- **Health Promotion** – Health isn't just going to the doctor. The process of empowering individuals and communities to increase control over, and to improve, their health.

## How to Use This Document

The purpose of this document is to provide clear definitions and parameters for each of the outputs and outcomes featured in the United Way's Social Services Common Measures Framework in the areas of Education, Income/Basic Needs, and Health. This effort should make it easier for participating service providers to know when to measure, how to measure, and who to measure for each of

the outputs and outcomes. This effort will also make data easier to understand in the aggregate, which will help United Way and participating providers make data-driven decisions.

The table below includes the following information:

- **Measures:** The name for each output and outcome included in the Framework
- **Definitions:** Clear definitions and parameters for each output and outcome. This may include examples that help to clarify the range of a particular service, specific methods for calculating impact, or acknowledge special circumstances.
- **Verification Methods:** Clear list of acceptable methods of verifying that a particular output or outcome. It is important to note that there are typically multiple ways to verify each output and outcome.
- **Timing of Measurement:** This section should help providers clearly understand when an output or outcome must be verified in order to be included in an outcome report.

Please take special note of several phrases that appear frequently in the table below.

- **Services “provided through your organization”:** All outputs and outcomes should reflect services that you provide to clients either directly by your own staff or indirectly through a partner organization who works with clients you serve in a specific capacity.
- **Measured continuously:** This implies that measurement takes place as needed rather than at specific, pre-defined intervals.
- **Verified during the reporting period to be counted:** This is simply stating that the act of verifying an output or outcome must take place during the reporting period to be counted in results that are provided to United Way for any given reporting period.
- **Unduplicated:** Some measures specifically call for an unduplicated number of clients, which means that under no circumstances should an individual be included twice in the calculation. Other measures do not mention “unduplicated” in the definition, which means that there are instances where duplication is acceptable.

*Disclaimer: The information in this document was developed in collaboration with nonprofit partners and funders that operate in the North Texas region. The measures and definitions included may not be sufficient or adequate for a different community. Given the collaborative and evolving nature of this work, the information in this document is subject to change. Any questions regarding this document should be directed to United Way Impact Team.*

## Education – Strong Start

Measure	Definition	Verification Methods	Timing of Measurement
Pre-Kindergarten/Kindergarten Readiness	<p>Number of children that will transition to Pre-Kindergarten/Kindergarten</p> <p>Children who have attended the program at least 85% or more during the program year that are successfully prepared for Pre-Kindergarten/Kindergarten school entry based on the necessary skills in accordance with Early Childhood Education Division of Texas Education Agency, TEA.  <a href="https://tea.texas.gov/earlychildhoodeducation.aspx">https://tea.texas.gov/earlychildhoodeducation.aspx</a></p> <p>Research indicates that full-day, full-year quality Early Childhood Programs attribute to greater Pre-Kindergarten/Kindergarten readiness when attended regularly.</p> <p>Pre-Kindergarten/Kindergarten readiness assessment is defined as: a TEA approved assessment that determines readiness for Pre-Kindergarten/Kindergarten through the use of an instrument which measures school readiness across multiple developmental domains.</p> <p>The following is an approved list of readiness assessment instruments approved by TEA:  <a href="https://tea.texas.gov/Academics/Early_Childhood_Education/Educator_Resources/">https://tea.texas.gov/Academics/Early_Childhood_Education/Educator_Resources/</a></p> <p>Pre-Kindergarten:</p> <ul style="list-style-type: none"> <li>• BASC-3 BESS</li> <li>• CIRCLE</li> <li>• DIAL-4</li> <li>• Frog Street Assessment</li> <li>• GOLD</li> </ul>	<ul style="list-style-type: none"> <li>• Pre/Post Assessments</li> <li>• Database</li> <li>• Children’s files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically either informally (portfolios) or formally (assessments in the Fall &amp; Spring) of the program year.</li> <li>• Pre-Kindergarten               <ul style="list-style-type: none"> <li>• In Fall and Spring of program year prior to starting Kindergarten.</li> </ul> </li> <li>• Kindergarten               <ul style="list-style-type: none"> <li>• In Fall and Spring of program year prior to starting Kindergarten.</li> <li>• In Fall after starting Kindergarten.</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>• ISIP-Early Reading</li> <li>• LAP-3</li> <li>• Work Sampling System</li> </ul> <p>Kindergarten:</p> <ul style="list-style-type: none"> <li>• aimswebPlus</li> <li>• BASC-3 BESS</li> <li>• DESSA-mini</li> <li>• DIAL-4</li> <li>• DIBELS Next</li> <li>• ISIP Early Reading</li> <li>• LION for Reading</li> <li>• MAP for Primary Grades</li> <li>• Ready, Set, K!</li> <li>• STAR Early Literacy</li> <li>• Tejas LEE</li> <li>• TPRI</li> <li>• TX-KEA</li> <li>• Work Sampling System</li> </ul>		
<p>Children progressing toward developmental milestones</p>	<p>Number of children attending the program at least 85% or more during the program year who demonstrate progress toward individual developmental milestones</p> <p>This is derived from the results of developmental monitoring and screening.</p> <p>Developmental Milestones are defined as: behaviors or physical skills seen in children as they grow and develop e.g. Rolling over, crawling, walking, and talking etc.</p> <p>Developmental Monitoring is defined as: An informal observation of how children grow and change over time, noting whether children meet the typical developmental milestones for their age range.</p>	<ul style="list-style-type: none"> <li>• Pre/Post Assessments</li> <li>• Database</li> <li>• Children’s files</li> </ul>	<ul style="list-style-type: none"> <li>• Informal – Developmental Monitoring <ul style="list-style-type: none"> <li>○ Measured continuously or periodically.</li> </ul> </li> <li>• Formal – Developmental Screening <ul style="list-style-type: none"> <li>○ Measured annually, usually within the first 45 days of the new program year.</li> </ul> </li> </ul>

	<p>Developmental Screening is defined as: A formal questionnaire or checklist based on research that takes a closer look at how children are developing. The tools used for developmental screening asks questions about children’s language, movement, thinking, behavior, and emotions.</p> <p>The following methods can be used to for Developmental Monitoring (Centers for Disease Control and Prevention):</p> <ul style="list-style-type: none"> <li>• Observing children during play</li> <li>• Milestones Checklists</li> <li>• Documenting findings in Child records/files e.g. Portfolios</li> <li>• Conversations with Parents</li> </ul> <p>The following tools can be used to complete Developmental Screening (American Academy of Pediatrics):</p> <ul style="list-style-type: none"> <li>• Ages &amp; Stages Questionnaires</li> <li>• Battelle Developmental Inventory Screening Tool 2nd ed</li> <li>• Bayley Infant Neuro Developmental Screen</li> <li>• Brigance Screens-II</li> <li>• Child Developmental Inventory</li> <li>• Communication and Symbolic Behavior Scales Developmental Profile</li> <li>• Early Language Milestone Scale</li> <li>• Early Motor Pattern Profile</li> <li>• Motor Quotient</li> <li>• Checklist for Autism in Toddlers</li> <li>• Modified Checklist for Autism in Toddlers</li> </ul>		
<p>Children meeting or exceeding their individual developmental milestones</p>	<p>Number of children attending the program at least 85% or more during the program year who meet or exceed their individual developmental milestones.</p> <p>This is derived from the results of developmental monitoring and screening.</p>	<ul style="list-style-type: none"> <li>• Pre/Post Assessments</li> <li>• Database</li> <li>• Children’s files</li> </ul>	<ul style="list-style-type: none"> <li>• Informal – Developmental Monitoring <ul style="list-style-type: none"> <li>○ Measured continuously or periodically.</li> </ul> </li> </ul>

	<p>Developmental Milestones is defined as: Behaviors or physical skills seen in children as they grow and develop e.g. Rolling over, crawling, walking, and talking etc.</p> <p>Developmental Monitoring is defined as: An informal observation of how children grow and change over time, noting whether children meet the typical developmental milestones for their age range.</p> <p>Developmental Screening is defined as: A formal questionnaire or checklist based on research that takes a closer look at how children are developing. The tools used for developmental screening asks questions about children’s language, movement, thinking, behavior, and emotions.</p> <p>The following methods can be used to for Developmental Monitoring (Centers for Disease Control and Prevention):</p> <ul style="list-style-type: none"> <li>• Observing children during play</li> <li>• Milestones Checklists</li> <li>• Documenting findings in Child records/files e.g. Portfolios</li> <li>• Conversations with Parents</li> </ul> <p>The following tools can be used to complete Developmental Screening (American Academy of Pediatrics):</p> <ul style="list-style-type: none"> <li>• Ages &amp; Stages Questionnaires</li> <li>• Battelle Developmental Inventory Screening Tool 2nd ed</li> <li>• Bayley Infant Neuro Developmental Screen</li> <li>• Brigance Screens-II</li> <li>• Child Developmental Inventory</li> <li>• Communication and Symbolic Behavior Scales Developmental Profile</li> <li>• Early Language Milestone Scale</li> <li>• Early Motor Pattern Profile</li> <li>• Motor Quotient</li> <li>• Checklist for Autism in Toddlers</li> <li>• Modified Checklist for Autism in Toddlers</li> </ul>		<ul style="list-style-type: none"> <li>• Formal – Developmental Screening <ul style="list-style-type: none"> <li>○ Measured annually, usually within the first 45 days of the new program year.</li> </ul> </li> </ul>
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Family Engagement	<p>Number of parents/caregivers who demonstrate growth in parenting practices.</p> <p>This is defined by the promising research-based, research-based or evidence-based tool utilized by the program.</p> <p>As noted by the Administration for Children and Families Research-Based tool is defined as a tool that is:</p> <ul style="list-style-type: none"> <li>• Founded on solid research about parenting concepts, skills, and practices</li> <li>• Promotes activities that have been previously shown to have positive effects on parenting and child outcomes</li> <li>• Offers a preliminary or descriptive evaluation of the curriculum itself, but has not necessarily confirmed that any changes in desired parenting and child outcomes were related to or caused by the curriculum</li> </ul> <p>Promising Research-Based tool is defined as a tool that:</p> <ul style="list-style-type: none"> <li>• Includes everything in the research-based category</li> </ul> <p>and</p> <ul style="list-style-type: none"> <li>• Has at least one quasi-experimental study that influences the desired parenting and child outcomes</li> </ul> <p>Evidence-Based tool is defined as a tool that:</p> <ul style="list-style-type: none"> <li>• Includes everything in the research-based and promising research-based categories</li> </ul> <p>and</p> <ul style="list-style-type: none"> <li>• Offers more than one strong quasi-experimental and random assignment study or set of studies that influences or causes changes in desired parenting and child outcomes</li> </ul> <p>More information about parenting interventions can be found in the Compendium of Parenting Interventions</p>	<ul style="list-style-type: none"> <li>• Attendance Records</li> <li>• Pre/Post Survey</li> <li>• Pre/Post Assessment</li> <li>• Qualitative data reports</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically, including at the end of the program year.</li> <li>• Verified during the reporting period to be counted.</li> </ul>

	<a href="https://eclkc.ohs.acf.hhs.gov/sites/default/files/pdf/compendium-of-parenting.pdf">https://eclkc.ohs.acf.hhs.gov/sites/default/files/pdf/compendium-of-parenting.pdf</a>		
Teacher & Staff Professional Development	Number of teacher and/or program staff reporting an increase in certification completion, continuing education credits and professional development opportunities.	<ul style="list-style-type: none"> <li>• Pre- &amp; Post-Assessments</li> <li>• Certification and Credential Documents</li> <li>• Professional Development Attendance Reports</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically.</li> </ul>

## Education – Academic Success

Measure	Definition	Verification Methods	Timing of Measurement
Test Score Improvement	Number of students that demonstrate an increase in core subject test scores.	<ul style="list-style-type: none"> <li>• Report Cards</li> <li>• End of Course Grades</li> <li>• STAAR Test</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically (6-weeks report cards, final test scores per semester).</li> </ul>
Grade Improvement	Number of students that demonstrate an increase in grades.	<ul style="list-style-type: none"> <li>• Report Cards</li> <li>• End of Course Grades</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically (6-weeks report cards, final test scores per semester).</li> </ul>
Grade-Level Reading	Number of students that show maintaining and/or improvement in reading level.	<ul style="list-style-type: none"> <li>• Pre- &amp; Post-Assessments</li> <li>• STAAR Test</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically, including a final assessment at the</li> </ul>

			end of the program period.
STEM Content Knowledge	Number of students that maintain or increase STEM specific content knowledge.	<ul style="list-style-type: none"> <li>• Pre- &amp; Post-Assessments</li> <li>• End of Course Grades</li> <li>• STAAR Test</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically, including a final assessment at the end of the program period.</li> </ul>
Middle School Math Performance	Number of students that show maintaining and/or improvement in 8 <sup>th</sup> grade Algebra	<ul style="list-style-type: none"> <li>• Pre- &amp; Post-Assessments</li> <li>• STAAR Test</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically, including a final assessment at the end of the program period.</li> </ul>
Middle School Science Performance	Number of students that demonstrate 8 <sup>th</sup> grade science promotion.	<ul style="list-style-type: none"> <li>• Pre- &amp; Post-Assessments</li> <li>• STAAR Test</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically, including a final assessment at the end of the program period.</li> </ul>
School Attendance	<p>Number of students demonstrating improvement in school attendance.</p> <ul style="list-style-type: none"> <li>• Tracked from the start of the reporting period to the end of the reporting period (July 1 – June 30)</li> </ul>	<ul style="list-style-type: none"> <li>• Attendance Records</li> <li>• Enrollment Records</li> </ul>	<ul style="list-style-type: none"> <li>• Initial attendance should be recorded at the beginning of the program period.</li> <li>• Verified during the reporting period to be counted.</li> </ul>
Grade-Level Promotion	Number of students promoted to the next grade level on time.	<ul style="list-style-type: none"> <li>• School enrollment records</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at the conclusion of the school year.</li> <li>• Verified during the reporting period to be counted.</li> </ul>

Accountability and Personal Responsibility	Number of students demonstrating an increased accountability and/or sense of personal responsibility	<ul style="list-style-type: none"> <li>• Pre- &amp; Post-Assessments</li> <li>• Surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically.</li> </ul>
Student Leadership	Number of students demonstrating ability and interest to lead others or activities.	<ul style="list-style-type: none"> <li>• Pre- &amp; Post-Assessments</li> <li>• Surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically.</li> </ul>
Civic Engagement	Number of students demonstrating an increase in action and engagement on specific issues affecting life and community.	<ul style="list-style-type: none"> <li>• Pre- &amp; Post-Assessments</li> <li>• Surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically.</li> </ul>
Work and Study Habits	Number of students that demonstrate an improvement in work and study habits.	<ul style="list-style-type: none"> <li>• Pre- &amp; Post-Assessments</li> <li>• End of Course Grades</li> <li>• STAAR Test</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically.</li> </ul>
Student Behavior	Number of students that demonstrate reduction or prevention of incidence in reduction in risky behaviors.	<ul style="list-style-type: none"> <li>• Pre- &amp; Post-Assessments</li> <li>• Campus Behavior Reports</li> <li>• Surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically.</li> </ul>
Peer & Adult Interactions	Number of students demonstrating an increase in positive interaction with peers and/or adults.	<ul style="list-style-type: none"> <li>• Pre- &amp; Post-Assessments</li> <li>• Surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically.</li> </ul>
Length of Quality Relationships (Mentoring)	Number of students and/or adults that report an increased duration of quality relationship between adult and student.	<ul style="list-style-type: none"> <li>• Pre- &amp; Post-Assessments</li> <li>• Surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically.</li> </ul>
Mentor Retention	Number of adult mentors retained year after year	<ul style="list-style-type: none"> <li>• Recruitment Records</li> <li>• Surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously based on program length.</li> </ul>

Parent Engagement	Number of parents reporting an increase in school-based engagement participation.	<ul style="list-style-type: none"> <li>• Pre- &amp; Post-Assessments</li> <li>• Surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically.</li> </ul>
Teacher & Staff Professional Development	Number of teacher and/or program staff reporting an increase in certification completion, continuing education credits and professional development opportunities.	<ul style="list-style-type: none"> <li>• Pre- &amp; Post-Assessments</li> <li>• Certification and Credential Documents</li> <li>• Professional Development Attendance Reports</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically.</li> </ul>

## Education – Success After High School

High School Choices and Options	Number of students demonstrating an increased understanding of high school choices	<ul style="list-style-type: none"> <li>• High School Planning Documents</li> <li>• Surveys</li> <li>• High School Endorsement</li> <li>• Magnet, Collegiate Academy, Alternative High School Applications</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically.</li> <li>• Measured at the conclusion of the school year for students entering high school.</li> </ul>
High School Graduation	<p>Number of high school seniors graduating on time.</p> <ul style="list-style-type: none"> <li>• Measured by # of Freshman in a set cohort who graduate in four years.</li> </ul> <p><i>This indicator examines the percentage of public high school students who graduate on time, as measured by the adjusted cohort graduation rate</i></p>	<ul style="list-style-type: none"> <li>• Attendance Records</li> <li>• Enrollment Records</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at the conclusion of the school year for graduating seniors.</li> <li>• Verified during the reporting period to be counted.</li> </ul>

	<p>(ACGR). State education agencies calculate the ACGR by identifying the "cohort" of first-time 9th-graders in a particular school year. The cohort is then adjusted by adding any students who transfer into the cohort after 9th grade and subtracting any students who transfer out, emigrate to another country, or die. The ACGR is the percentage of students in this adjusted cohort who graduate within 4 years with a regular high school diploma (National Center for Education Statistics).</p>		
College Choices and Options	Number of students demonstrating an increased knowledge of college choices.	<ul style="list-style-type: none"> <li>• Surveys</li> <li>• College Application Completions</li> <li>• FAFSA Completion</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically.</li> </ul>
College Ready	<p>Number of students that graduate college ready.</p> <p>Defined by 2018 TEA standards: Percentage of annual graduates that accomplish any one of the following:</p> <ul style="list-style-type: none"> <li>• Meet TSI criteria on TSIA, ACT, SAT, or complete and receive credit for a college prep course in ELA/reading <b>and</b> mathematics.</li> <li>• Meet AP/IB criteria</li> <li>• Earn 3 hours of dual-course credits in ELA/Mathematics or 9 hours in any subject</li> <li>• Enlist in the U.S. Armed Forces</li> <li>• Earn an approved industry-based certification (of the 72 approved)</li> <li>• Earn an associate's degree while in high school</li> <li>• Graduate with completed IEP and workforce readiness</li> <li>• Complete CTE coherent sequence coursework and earn credit aligned with approved industry-based certifications</li> </ul>	<ul style="list-style-type: none"> <li>• SAT Scores</li> <li>• ACT Scores</li> <li>• TSIA</li> <li>• AP/IB Exams</li> <li>• Dual-Course Credits</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at the conclusion of the school year for graduating seniors.</li> <li>• Mid-Year measurement can occur as students complete testing: March, May, June, August, October, November, and December.</li> </ul>
Post-Secondary Enrollment	<p>Number of students that enroll in post-secondary education.</p> <p>Post-secondary education options can include:</p> <ul style="list-style-type: none"> <li>• 4-Year College &amp; Universities</li> <li>• 2-Year Colleges</li> <li>• Vocational-Technical Schools and Programs</li> </ul>	<ul style="list-style-type: none"> <li>• Enrollment Records</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at the time of post-secondary enrollment.</li> <li>• Verified during the reporting period to be counted.</li> </ul>

	<ul style="list-style-type: none"> <li>• <i>Adult Education and Continuing Education Programs</i></li> </ul>		
Post-Secondary Persistence	Number of students that demonstrate post-secondary education persistence	<ul style="list-style-type: none"> <li>• Grade Records/Transcripts</li> <li>• Clearinghouse Data</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at the conclusion of each academic year.</li> <li>• Verified during the reporting period to be counted.</li> </ul>
Career Pathways	Number of students demonstrating increased awareness of an interest in careers and employment pathways.	<ul style="list-style-type: none"> <li>• Pre- &amp; Post-Assessments</li> <li>• Surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically.</li> </ul>
Job Readiness	Number of students demonstrating increase in job readiness skills.	<ul style="list-style-type: none"> <li>• Pre- &amp; Post-Assessments</li> <li>• Surveys</li> <li>• Internship completion</li> <li>• Employment Records</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously or periodically.</li> </ul>

## Health – Primary & Clinical Care

Panel	Measure/Definition	Verification Methods	Timing of Measurement
Individuals, of any age, receiving ongoing care for one or more chronic conditions	<p>Number of individuals, of any age, who receive ongoing care for one or more chronic conditions. Ongoing care is defined as, at least two visits in one program year.</p> <p><i>Examples of Chronic conditions include but are not limited to:</i><sup>1</sup></p> <ul style="list-style-type: none"> <li>• Diabetes</li> <li>• Heart Disease</li> <li>• Cancer</li> <li>• HIV/AIDS</li> </ul>	<ul style="list-style-type: none"> <li>• Electronic Health Records System</li> </ul>	<ul style="list-style-type: none"> <li>• Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>
Individuals, who are at least 6 years old or older, who receive a check-up/well visit	<p>Number of individuals, who are at least 6 years old or older, who receive a check-up/well visit.</p> <ul style="list-style-type: none"> <li>• Check-up/well visit is defined as, a routine physical exam, well child/baby exam, yearly physical, or any visit that does not fit into either chronic care or acute/sick visit.</li> </ul>	<ul style="list-style-type: none"> <li>• Electronic Health Records System</li> </ul>	<ul style="list-style-type: none"> <li>• Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>
Individuals, who are at least 6 years old or older, who receive an immunization	<p>Number of individuals, who are at least 6 years old or older, who receive an immunization</p> <p><i>Examples of immunizations can include but are not limited to:</i></p> <ul style="list-style-type: none"> <li>• Flu</li> <li>• Pneumonia</li> <li>• HPV</li> <li>• Boosters</li> </ul>	<ul style="list-style-type: none"> <li>• Electronic Health Records System</li> </ul>	<ul style="list-style-type: none"> <li>• Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>

<sup>1</sup> Types of services pulled from Common Outcomes Survey Report Question 10 regarding the definition of Job Placement Services.

<p>individuals, of any age, who receive a preventative health service or screening.</p>	<p>Number of individuals, of any age, who receive a preventative health service or screening.</p> <p><i>Examples of services/screenings can include but are not limited to:</i></p> <ul style="list-style-type: none"> <li>• Vision</li> <li>• Dental</li> <li>• Cancer</li> <li>• Heart Disease</li> </ul> <p><b><u>Please exclude screenings related to:</u></b></p> <ul style="list-style-type: none"> <li>• Substance Abuse</li> <li>• Mental Health Issues</li> </ul>	<ul style="list-style-type: none"> <li>• Electronic Health Records System</li> </ul>	<ul style="list-style-type: none"> <li>• Clinical service must be verified as taking place during the reporting period to be counted.</li> </ul>
<p>Individuals enrolled or renewed for health coverage as a result of program</p>	<p>Number of individuals enrolled or renewed for health coverage as a result of program.</p>	<ul style="list-style-type: none"> <li>• Electronic Health Records System</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Enrollment or renewal must take place during the reporting period to be counted.</b></li> </ul>
<p>Individuals with an ongoing medical care provider.</p>	<p>Number of individuals with an ongoing medical care provider. Ongoing care is defined by at least two visits in one program year.</p> <p>Medical homes</p>	<ul style="list-style-type: none"> <li>• Electronic Health Records System</li> </ul>	<ul style="list-style-type: none"> <li>• Clinical service must be verified as taking place during the reporting period to be counted.</li> </ul>
<p>Individuals who receive transportation to medical appointments, as a result of the work of the</p>	<p>Number of individuals who receive transportation to medical appointments, as a result of the work of the program/agency staff or a result of program.</p>	<ul style="list-style-type: none"> <li>• Electronic Health Records System</li> </ul>	<ul style="list-style-type: none"> <li>• Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>

program/agency staff or a result of program.			
Children who receive a well-child/baby exam	Number of children, who are 5 years old or younger, who receive a well-child/baby exam.	<ul style="list-style-type: none"> <li>Electronic Health Records System</li> </ul>	<ul style="list-style-type: none"> <li>Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>
Children who receive an immunization.	Number of children, who are 5 years old or younger, who receive an immunization.	<ul style="list-style-type: none"> <li>Electronic Health Records System</li> </ul>	<ul style="list-style-type: none"> <li>Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>
Pregnant women who start prenatal care in the first trimester	<p>Number of pregnant women who start prenatal care in the first trimester.</p> <p>Only include prenatal care that is provided by a doctor of medicine (MD), doctor of osteopathy (DO), certified midwife (CM), certified nurse midwife(CNM), certified professional midwife (CPM), nurse practitioner (NP), physician assistant (PA), or registered nurse (RN).</p>	<ul style="list-style-type: none"> <li>Electronic Health Records System</li> </ul>	<ul style="list-style-type: none"> <li>Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>
Pregnant women who receive standard prenatal care according to schedule	<p>Number of pregnant women who receive prenatal care, based on the standard prenatal care schedule and/or their medical provider's recommendations.</p> <p>Please include women beginning prenatal care at any point in their pregnancy.</p> <p>Only include prenatal care that is provided by a doctor of medicine (MD), doctor of osteopathy (DO), certified midwife (CM), certified nurse midwife(CNM), certified professional midwife (CPM), nurse practitioner (NP), physician assistant (PA), or registered nurse (RN).</p>	<ul style="list-style-type: none"> <li>Electronic Health Records System</li> </ul>	<ul style="list-style-type: none"> <li>Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>
Infants born at very low birth weight	Number of infants born at very low birth weight, <1500 grams (3.3lbs).	<ul style="list-style-type: none"> <li>Electronic Health Records System</li> </ul>	<ul style="list-style-type: none"> <li>Clinical services must be verified as taking place</li> </ul>

			during the reporting period to be counted.
Infants born at low birth weight	Number of infants born at low birth weight, between 1500 grams (3.3lbs) and <2500 grams (5.5lbs).	<ul style="list-style-type: none"> <li>Electronic Health Records System</li> </ul>	<ul style="list-style-type: none"> <li>Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>
Infants born at healthy/normal birth weight	Number of infants born at healthy/normal birth weight, between 2500 grams (5.5lbs) and <4000 grams (8.8lbs).	<ul style="list-style-type: none"> <li>Electronic Health Records System</li> </ul>	<ul style="list-style-type: none"> <li>Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>
Babies born prior to 37 weeks of pregnancy	Number of babies born prior to 37 weeks of pregnancy.	<ul style="list-style-type: none"> <li>Electronic Health Records System</li> </ul>	<ul style="list-style-type: none"> <li>Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>

## Health – Behavioral and Mental Health

Individuals who receive individual (one on one) therapy services	<p>Number of individuals who receive individual (one on one) therapy services.</p> <ul style="list-style-type: none"> <li>Services must be delivered or overseen by a licensed counselor.</li> </ul>	<ul style="list-style-type: none"> <li>Client Management System</li> </ul>	<ul style="list-style-type: none"> <li>Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>
Individuals who receive group support services	<p>Number of individuals who receive group support services. Group services can be either a family group or a non-related group.</p> <ul style="list-style-type: none"> <li>Services must be delivered or overseen by a licensed counselor.</li> </ul>	<ul style="list-style-type: none"> <li>Client management system</li> </ul>	<ul style="list-style-type: none"> <li>Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>

<p>Individuals who receive mental health crisis intervention</p>	<p>Number of individuals who receive mental health crisis intervention. Crisis intervention includes interventions provided in person, by text, phone, email, or other method.</p> <ul style="list-style-type: none"> <li>• Services must be delivered or overseen by a licensed counselor.</li> </ul> <p>Mental Health crisis can be defined but not limited to:</p> <ul style="list-style-type: none"> <li>• Suicide attempt</li> <li>• Panic attack related to trauma</li> <li>• Evidence of self-harm</li> </ul>	<ul style="list-style-type: none"> <li>• Client management system</li> </ul>	<ul style="list-style-type: none"> <li>• Clinical services must be verified as taking place during the reporting period to be counted</li> </ul>
<p>Individuals who have access to needed prescription drugs used to treat or control a mental health condition</p>	<p>Number of individuals who have access to needed prescription drugs used to treat or control a mental health condition, as a result of the work of the program/agency staff or a result of program.</p>	<ul style="list-style-type: none"> <li>• Client management system</li> </ul>	<ul style="list-style-type: none"> <li>• Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>
<p>Individuals who show a positive increase on an evidence-based functionality scale delivered by a licensed counselor</p>	<p>Number of individuals who show a positive increase on an evidence-based functionality scale delivered by a licensed counselor.</p> <ul style="list-style-type: none"> <li>• This can be any evidence-based functionality scale.</li> <li>• Delivered by a licensed counselor.</li> </ul>	<ul style="list-style-type: none"> <li>• Evidence based functionality scale relevant to mental health assessment</li> <li>• Assessment delivered by the counselor</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at intervals relevant to the assessment tool or client need</li> <li>• Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>

## Health – Substance Abuse

Individuals completing healthy coping behaviors/substance abuse lifestyle	Number of individuals completing an evidence-based and skill-building program relating to learning healthy coping behaviors and/or maintaining a substance abuse free lifestyle.	<ul style="list-style-type: none"> <li>Client management system</li> </ul>	<ul style="list-style-type: none"> <li>Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>
Individuals completing residential substance abuse	Number of individuals completing residential substance abuse treatment.	<ul style="list-style-type: none"> <li>Client management system</li> </ul>	<ul style="list-style-type: none"> <li>Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>
Individuals completing outpatient substance abuse treatment	Number of individuals completing outpatient substance abuse treatment.	<ul style="list-style-type: none"> <li>Client management system</li> </ul>	<ul style="list-style-type: none"> <li>Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>
Individuals in recovery support services	Number of individuals in recovery support services.	<ul style="list-style-type: none"> <li>Client management system</li> </ul>	<ul style="list-style-type: none"> <li>Clinical services must be verified as taking place during the reporting period to be counted.</li> </ul>

## Health – Family Violence

Individuals who develop a safety plan	Number of individuals who develop a safety plan.	<ul style="list-style-type: none"> <li>Client management system</li> </ul>	<ul style="list-style-type: none"> <li>Programming completed during the reporting period.</li> </ul>
Individuals who achieve a permanent and	Number of individuals who achieve a permanent and stable living environment.	<ul style="list-style-type: none"> <li>Client management system</li> </ul>	<ul style="list-style-type: none"> <li>Programming completed during the reporting period.</li> </ul>

stable living environment	This includes, but is not limited to; achieving permanency and exiting the foster care system, a stable and violence-free home after receiving domestic violence services, etc. Agency will need to define what a "permanent and stable living environment" is.		
Individuals who receive services family violence	Number of individuals who receive family violence related legal services, client advocacy, or assistance, as a result of the work of the program/agency staff or a result of program.	<ul style="list-style-type: none"> <li>• Client management system</li> </ul>	<ul style="list-style-type: none"> <li>• Programming completed during the reporting period.</li> </ul>
Individuals who receive case investigation services	Number individuals who receive case investigation services, as a result of the work of the program/agency staff or a result of program. Case investigation includes, but is not limited to, any aspect of investigating criminal cases, CPS cases, APS cases, and other abuse/neglect cases or family violence related cases.	<ul style="list-style-type: none"> <li>• Client management system</li> </ul>	<ul style="list-style-type: none"> <li>• Programming completed during the reporting period.</li> </ul>
Individuals who receive any family violence services	Number of individuals who receive any family violence services.  United Way of Metropolitan Dallas defines family violence services as services relating to or resulting from domestic/intimate partner violence/abuse, child abuse/neglect, and elder abuse/neglect.	<ul style="list-style-type: none"> <li>• Client management system</li> </ul>	<ul style="list-style-type: none"> <li>• Programming completed during the reporting period.</li> </ul>
Individuals who receive family violence related crisis intervention.	Number of individuals who receive family violence related crisis intervention.  Crisis intervention includes interventions provided in person, by text, phone, email, or other method. United Way of Metropolitan Dallas defines family violence services as services relating to or resulting from domestic/intimate partner violence/abuse, child abuse/neglect, and elder abuse/neglect.	<ul style="list-style-type: none"> <li>• Client management system</li> </ul>	<ul style="list-style-type: none"> <li>• Programming completed during the reporting period.</li> </ul>
Individuals who receive residential domestic/intimat	Number of individuals who receive residential domestic/intimate partner violence services.	<ul style="list-style-type: none"> <li>• Client management system</li> </ul>	<ul style="list-style-type: none"> <li>• Programming completed during the reporting period.</li> </ul>

e partner violence services			
Individuals who receive transitional housing services	Number of individuals who receive transitional housing services, as part of domestic/intimate partner violence services.	<ul style="list-style-type: none"> <li>• Client management system</li> </ul>	<ul style="list-style-type: none"> <li>• Programming completed during the reporting period.</li> </ul>
Individuals who complete battering intervention and prevention (BIPP) services/treatment	Number of individuals who complete battering intervention and prevention (BIPP) services/treatment.	<ul style="list-style-type: none"> <li>• Client management system</li> </ul>	<ul style="list-style-type: none"> <li>• Programming completed during the reporting period.</li> </ul>
Individuals who complete an evidence-based skill building program	Number of individuals who complete an evidence-based skill building program related to the following life skills: age appropriate discipline child development, positive communication, relationship building, prosocial behavior, bullying prevention, self-management of anger, healthy relationships, or other social and emotional skills.	<ul style="list-style-type: none"> <li>• Client management system</li> </ul>	<ul style="list-style-type: none"> <li>• Programming completed during the reporting period.</li> </ul>
Individuals that have an increasing system of support to discuss serious problems	<p>Number of individuals that have an increasing system of support to discuss serious problems.</p> <p>Please include seniors, adults, teenagers, and children.</p>	<ul style="list-style-type: none"> <li>• Client management system</li> </ul>	<ul style="list-style-type: none"> <li>• Programming completed during the reporting period.</li> </ul>

## Health – Health Promotions

Individuals completing evidence-based and skill-building, education related to physical activity	Number of individuals completing evidence-based and skill-building, education related to physical activity.	<ul style="list-style-type: none"> <li>• Client management system</li> </ul>	<ul style="list-style-type: none"> <li>• Programming completed during the reporting period.</li> </ul>
Individuals completing evidence-based and skill-building education related to nutrition and healthy eating	Number of individuals completing evidence-based and skill-building education related to nutrition and healthy eating.	<ul style="list-style-type: none"> <li>• Client management system</li> </ul>	<ul style="list-style-type: none"> <li>• Programming completed during the reporting period.</li> </ul>
Individuals who decrease their BMI/zBMI	<p>Number of individuals who decrease their BMI/zBMI.</p> <p>The calculations for a BMI/zBMI score should be based on the CDC and/or WHO growth charts or BMI calculators.</p>	<ul style="list-style-type: none"> <li>• Client management system</li> </ul>	<ul style="list-style-type: none"> <li>• Pre- and post-programming evaluation</li> </ul>
Individuals who attain a reduction in waist circumference	Number of individuals who attain a reduction in waist circumference.	<ul style="list-style-type: none"> <li>• Client management system</li> </ul>	<ul style="list-style-type: none"> <li>• Pre- and post-programming evaluation</li> </ul>
Individuals who reach and maintain a healthy BMI	<p>Number of individuals who reach and maintain a healthy BMI.</p> <p>The calculations for a BMI score should be based on the CDC and/or WHO growth charts or BMI calculators. This includes individuals who participate in the program with the goal of maintaining a healthy weight.</p>	<ul style="list-style-type: none"> <li>• Client management system</li> </ul>	<ul style="list-style-type: none"> <li>• Pre- and post-programming evaluation</li> </ul>

Individuals who report a behavior change related to diet or exercise post intervention	Number of individuals who report a behavior change related to diet or exercise post intervention.	<ul style="list-style-type: none"><li>• Client management system</li></ul>	<ul style="list-style-type: none"><li>• Post programming follow-up</li></ul>
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## Income - Basic Needs – Emergency Shelter and Transitional Housing

Measure	Definition	Verification Methods	Timing of Measurement
Households receiving emergency shelter services	<p>Number of HOUSEHOLDS who received emergency shelter services</p> <p><i>Services is defined as 1 bed night of stay.</i></p> <p><i>This number can be duplicated if a household leaves the agency’s emergency shelter, transitions to another location, and then transitions back the agency’s shelter within the reporting period.</i></p> <p><i>Include hotel vouchers paid for by agency</i></p> <p><i>Emergency Shelter is defined as any facility whose primary purpose is to provide temporary or transitional shelter for the homeless in general or for specific populations of the homeless for a period of 90 days or less. Supportive services may or may not be provided in addition to the provision of shelter.</i></p> <p><i>Households is defined as: all the people who occupy a housing unit. A household includes the related family members and all the unrelated people, if any, such as lodgers, foster children, wards, or employees who share the housing unit. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household.</i></p>	<ul style="list-style-type: none"> <li>• Intake assessments</li> <li>• Client logs</li> <li>• Case management logs</li> <li>• HMIS</li> <li>• Receipts from hotel/motel</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
Clients receiving emergency shelter services	<p>Number of CLIENTS who received emergency shelter services.</p> <p><i>Services is defined as 1 bed night of stay.</i></p>	<ul style="list-style-type: none"> <li>• Intake assessments</li> <li>• Client logs</li> <li>• Case management logs</li> <li>• HMIS</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>

	<p><i>Emergency Shelter is defined as any facility whose primary purpose is to provide temporary or transitional shelter for the homeless in general or for specific populations of the homeless for a period of 90 days or less. Supportive services may or may not be provided in addition to the provision of shelter.</i></p> <p><i>Include hotel vouchers paid for by agency</i></p>	<ul style="list-style-type: none"> <li>• Receipts from hotel/motel</li> </ul>	
Average length (days) of stay - emergency shelter	<p>Average length (nights) at the emergency shelter</p> <p><b>Calculation:</b> AVERAGE LENGTH OF STAY is calculated by adding up the nights of stay for all clients and then dividing by the number of clients.</p>	<ul style="list-style-type: none"> <li>• Intake assessments</li> <li>• Client logs</li> <li>• Case management logs</li> <li>• HMIS</li> <li>• Receipts from hotel/motel</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
HOUSEHOLDS receiving transitional housing services	<p>Number of HOUSEHOLDS who received transitional housing services</p> <p><i>A type of supportive housing used to facilitate the movement of homeless individuals and families to permanent housing. Generally, homeless persons may live in transitional housing for up to 24 months and receive supportive services that enable them to live more independently. The supportive services may be provided by the organization managing the housing or coordinated by them and provided by other public or private agencies. Transitional housing can be provided in one structure or several structures, at one site or in multiple structures at scattered sites.</i></p> <p><i>Households is defined as: all the people who occupy a housing unit. A household includes the related family members and all the unrelated people, if any, such as lodgers, foster children, wards, or employees who share the housing unit. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household.</i></p>	<ul style="list-style-type: none"> <li>• Intake assessments</li> <li>• Client logs</li> <li>• Case management logs</li> <li>• HMIS</li> <li>• Receipts from hotel/motel</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>

CLIENTS receiving transitional housing services	<p>Number of CLIENTS who received transitional housing services</p> <p><i>A type of supportive housing used to facilitate the movement of homeless individuals and families to permanent housing. Generally, homeless persons may live in transitional housing for up to 24 months and receive supportive services that enable them to live more independently. The supportive services may be provided by the organization managing the housing or coordinated by them and provided by other public or private agencies. Transitional housing can be provided in one structure or several structures, at one site or in multiple structures at scattered sites.</i></p>	<ul style="list-style-type: none"> <li>• Intake assessments</li> <li>• Client logs</li> <li>• Case management logs</li> <li>• HMIS</li> <li>• Receipts from hotel/motel</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
Average length of stay - transitional housing	<p>Average length (nights) at the transitional shelter</p> <p><b>Calculation:</b> <i>AVERAGE LENGTH OF STAY is calculated by adding up the days of stay for all clients and then dividing by the number of clients.</i></p>	<ul style="list-style-type: none"> <li>• Intake assessments</li> <li>• Client logs</li> <li>• Case management logs</li> <li>• HMIS</li> <li>• Receipts from hotel/motel</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
Interviewed by HMIS	<p>Percent of CLIENTS who received emergency shelter or transitional housing services interviewed using HMIS</p>	<ul style="list-style-type: none"> <li>• Intake assessments</li> <li>• Client logs</li> <li>• Case management logs</li> <li>• HMIS</li> <li>• Receipts from hotel/motel</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
Transitioning to PSH or housing	<p>Number of HOUSEHOLDS who received emergency shelter stay or transitional housing services who transitioned to Permanent Supportive Housing or to their own housing.</p>	<ul style="list-style-type: none"> <li>• Intake assessments</li> <li>• Client logs</li> <li>• Case management logs</li> <li>• HMIS</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>

	<p><i>Permanent Supportive Housing (PSH) is a model that combines low-barrier affordable housing, health care, and supportive services to help individuals and families lead more stable lives. PSH typically targets people who are homeless or otherwise unstably housed, experience multiple barriers to housing, and are unable to maintain housing stability without supportive services.</i></p> <p><i>Households is defined as: all the people who occupy a housing unit. A household includes the related family members and all the unrelated people, if any, such as lodgers, foster children, wards, or employees who share the housing unit. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household.</i></p>	<ul style="list-style-type: none"> <li>• Receipts from hotel/motel</li> </ul>	
3-month post-exit retention	Number of HOUSEHOLDS who maintained permanent supportive housing or their own housing for 3 months after exiting your emergency shelter stay or transitional housing program.	<ul style="list-style-type: none"> <li>• Intake assessments</li> <li>• Client logs</li> <li>• Case management logs</li> <li>• HMIS</li> <li>• Receipts from hotel/motel</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>

### Income - Basic Needs – Prepared Meals and Food Pantry Meals

Clients receiving prepared meals	<p>Number of CLIENTS who received prepared meals</p> <p><i>Include Meals on Wheels, emergency meals for Meals on Wheels clients, meals at disaster relief sites</i></p>	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
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Number of prepared meals	Total number of prepared meals provided	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
Households receiving food pantry services	<p>Number of HOUSEHOLDS who received food pantry services</p> <p><i>Households is defined as: all the people who occupy a housing unit. A household includes the related family members and all the unrelated people, if any, such as lodgers, foster children, wards, or employees who share the housing unit. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household.</i></p>	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
Clients receiving food pantry services	<p>Number of CLIENTS who received food pantry services</p> <p>Include all members of the family</p>	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
Average pantry visits per households	<p>Average number pantry visits by households</p> <p><i>Households is defined as: all the people who occupy a housing unit. A household includes the related family members and all the unrelated people, if any, such as lodgers, foster children, wards, or employees who share the housing unit. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household.</i></p>	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
Pounds of food distributed	Total pounds of food distributed as defined by North Texas Food Bank's guidelines	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
Pounds of healthy food distributed	<p>Total pounds of healthy food distributed</p> <p><i>As defined by the North Texas Food Bank's guidelines</i></p>	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>

Hours the food pantry is open for clients	Total number of hours the Food Pantry is open per week <i>Sunday through Saturday</i>	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
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## Income - Basic Needs – Rental/Mortgage and Utility Assistance

HOUSEHOLDS receiving rental and mortgage assistance	Number of HOUSEHOLDS who received rental/mortgage assistance  <i>Households is defined as: all the people who occupy a housing unit. A household includes the related family members and all the unrelated people, if any, such as lodgers, foster children, wards, or employees who share the housing unit. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household.</i>	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
Clients receiving rental/mortgage assistance	Number of CLIENTS who received rental/mortgage assistance	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
Households receiving rental/mortgage assistance	Number of HOUSEHOLDS who received rental/mortgage assistance who maintained housing 3 months after  <i>Households is defined as: all the people who occupy a housing unit. A household includes the related family members and all the unrelated people, if any, such as lodgers, foster children, wards, or employees who share the housing unit. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household.</i>	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>

Average rental assistance provided	The average amount of rental assistance provided	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
Households receiving utility assistance	<p>Number of HOUSEHOLDS who received utility assistance</p> <p><i>Households is defined as: all the people who occupy a housing unit. A household includes the related family members and all the unrelated people, if any, such as lodgers, foster children, wards, or employees who share the housing unit. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household.</i></p>	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
Clients receiving utility assistance	Number of CLIENTS who received utility assistance	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
Households receiving utility assistance	<p>Number of HOUSEHOLDS who received utility assistance who remained connected to utilities for at least 3 months after</p> <p><i>Households is defined as: all the people who occupy a housing unit. A household includes the related family members and all the unrelated people, if any, such as lodgers, foster children, wards, or employees who share the housing unit. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household.</i></p>	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
Average utility assistance provided	The average amount of utility assistance provided	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>

## Basic Needs – Transportation & Furniture Assistance

Clients who received	Number of CLIENTS who received transportation assistance	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
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transportation assistance			
Households receiving furniture/home goods	<p>Number of HOUSEHOLDS who received furniture/home goods/housewares</p> <p><i>Households is defined as: all the people who occupy a housing unit. A household includes the related family members and all the unrelated people, if any, such as lodgers, foster children, wards, or employees who share the housing unit. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household.</i></p>	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>

## Income - Basic Needs – Information and Referral

Clients who received I/R	Number of CLIENTS who received Information & Referrals	<ul style="list-style-type: none"> <li>• Database</li> <li>• Files</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at time of service</li> </ul>
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## Income – Career Pathways

Measure	Definition	Verification Methods	Timing of Measurement
EMPLOYMENT SERVICES	<p>Number of <b>unduplicated</b> individuals who participated<sup>2</sup> in at least one service provided through your organization that helps a person obtain and/or maintain employment.</p> <p><i>Examples of EMPLOYMENT SERVICES include:</i><sup>3</sup></p> <ul style="list-style-type: none"> <li>• Basic Job readiness training (soft skills)</li> <li>• 1:1 pre and post-employment counseling</li> </ul>	<ul style="list-style-type: none"> <li>• Intake assessments</li> <li>• Classroom attendance rosters</li> <li>• Case management logs</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously</li> <li>• Employment services must be verified as taking place during the reporting period to be counted.</li> </ul>

<sup>2</sup> Note that we do **not** use the word “enrollment” anywhere in the common outcomes framework because we are primarily interested in knowing how many clients are “participating” or “accessing” services during the various reporting periods, regardless of when they happen to enroll.

<sup>3</sup> Types of services pulled from Common Outcomes Survey Report Question 10 regarding the definition of Job Placement Services.

	<ul style="list-style-type: none"> <li>• Resume development</li> <li>• Job interview training</li> <li>• Job search assistance</li> <li>• Career exploration and navigation services</li> <li>• Job application assistance</li> <li>• Targeted job referrals</li> <li>• Job retention support</li> </ul>		
EMPLOYMENT (FULL-TIME)	<p>Number of individuals who participated in EMPLOYMENT SERVICES who secured a job at 30 hours per week or more and completed their first day.</p> <p><b>Special Case: Two Jobs:</b> <i>If a client secures more than one job during the reporting period, count both jobs in the appropriate EMPLOYMENT areas.</i></p> <p><b>Special Case: Small Businesses:</b> Programs that provide small business assistance services should include all clients who start a small business (and thereby create a job for themselves) as well as all new positions created by the small business during the reporting period in the appropriate EMPLOYMENT areas.</p>	<ul style="list-style-type: none"> <li>• Client self-report</li> <li>• Employer self-report</li> <li>• Pay stub</li> <li>• Texas Workforce Commission database</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously</li> <li>• Employment must be verified during the reporting period to be counted.</li> </ul>
EMPLOYMENT (PART-TIME)	<p>Number of individuals who participated in EMPLOYMENT SERVICES who secured a job at less than 30 hours per week and completed their first day.</p> <p><b>Special Case: Two Jobs:</b> <i>If a client secures more than one job during the reporting period, count both jobs in the appropriate EMPLOYMENT areas.</i></p> <p><b>Special Case: Small Businesses:</b> Programs that provide small business assistance services should include all clients who start a small business (and thereby create a job for themselves) as well as all new</p>	<ul style="list-style-type: none"> <li>• Client self-report</li> <li>• Employer self-report</li> <li>• Pay stub</li> <li>• Texas Workforce Commission database</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously</li> <li>• Employment must be verified during the reporting period to be counted.</li> </ul>

	positions created by the small business during the reporting period in the appropriate EMPLOYMENT areas.		
EMPLOYMENT (UNKNOWN)	<p>Number of individuals who participated in EMPLOYMENT SERVICES who secured a job with unknown hours and completed their first day.</p> <p><b>Special Case: Two Jobs:</b> <i>If a client secures more than one job during the reporting period, count both jobs in the appropriate EMPLOYMENT areas.</i></p> <p><b>Special Case: Small Businesses:</b> Programs that provide small business assistance services should include all clients who start a small business (and thereby create a job for themselves) as well as all new positions created by the small business during the reporting period in the appropriate EMPLOYMENT areas.</p>	<ul style="list-style-type: none"> <li>• Client self-report</li> <li>• Employer self-report</li> <li>• Pay stub</li> <li>• Texas Workforce Commission database</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously</li> <li>• Employment must be verified during the reporting period to be counted.</li> </ul>
EMPLOYMENT (TOTAL)	The sum of EMPLOYMENT (FULL-TIME), EMPLOYMENT (PART-TIME), and EMPLOYMENT (UNKNOWN).	N/A	N/A
AVERAGE HOURLY WAGE AT EMPLOYMENT	<p>Average hourly wage among all individuals included in EMPLOYMENT (TOTAL).</p> <p><b>Calculation:</b> AVERAGE HOURLY WAGE is calculated by adding up the hourly wages for all clients for whom you were able to verify wage then dividing by the number of clients whom you were able to verify wage.</p> <p><b>Salaried Positions:</b> <i>If a client earns a salaried position, please convert salary to hourly wage using a calculator like <a href="http://hourlysalaries.com">hourlysalaries.com</a></i></p> <p><b>Special Case: Two Jobs:</b> <i>If a client secures two jobs during the reporting period, include the wages of both jobs in your calculation.</i></p>	<ul style="list-style-type: none"> <li>• Client self-report</li> <li>• Employer self-report</li> <li>• Pay stub</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously</li> <li>• Hourly wage at employment must be verified during the reporting period to be counted.</li> </ul>

<p>JOB RETENTION (30 DAYS)</p>	<p>Number of individuals who satisfy <b>both</b> conditions below:</p> <ul style="list-style-type: none"> <li>Secured employment during the current reporting period <b>OR</b> secured employment during the last 30 days of the previous reporting period</li> <li>Remained employed 30 days post-job placement with the same employer</li> </ul> <p><i><b>Special Case: Two Jobs:</b> If one client secures two jobs and is able to satisfy the above conditions with both jobs, count both jobs in the appropriate JOB RETENTION areas.</i></p>	<ul style="list-style-type: none"> <li>Client self-report</li> <li>Employer self-report</li> <li>Pay stub</li> <li>Texas Workforce Commission database</li> <li>The Work Number</li> </ul>	<ul style="list-style-type: none"> <li>Measured continuously, ~30 days after employment is verified</li> <li>30-day job retention must be verified during the reporting period to be counted.</li> </ul>
<p>JOB RETENTION (90 DAYS)</p>	<p>Number of individuals who satisfy <b>both</b> conditions below:</p> <ul style="list-style-type: none"> <li>Secured employment during the current reporting period <b>OR</b> secured employment during the last 90 days of the previous reporting period</li> <li>Remained employed 90 days post-job placement with the same employer</li> </ul> <p><i><b>Special Case: Two Jobs:</b> If one client secures two jobs and is able to satisfy the above conditions with both jobs, count both jobs in the appropriate JOB RETENTION areas.</i></p>	<ul style="list-style-type: none"> <li>Client self-report</li> <li>Employer self-report</li> <li>Pay stub</li> <li>Texas Workforce Commission database</li> <li>The Work Number</li> </ul>	<ul style="list-style-type: none"> <li>Measured continuously, ~90 days after employment is verified</li> <li>90-day job retention must be verified during the reporting period to be counted.</li> </ul>
<p>JOB RETENTION (180 DAYS)</p>	<p>Number of individuals who satisfy <b>both</b> conditions below:</p> <ul style="list-style-type: none"> <li>Secured employment during the current reporting period <b>OR</b> secured employment during the last 180 days of the previous reporting period</li> <li>Remained employed 180 days post-job placement with the same employer</li> </ul> <p><i><b>Special Case: Two Jobs:</b> If one client secures two jobs and is able to satisfy the above conditions with both jobs, count both jobs in the appropriate JOB RETENTION areas.</i></p>	<ul style="list-style-type: none"> <li>Client self-report</li> <li>Employer self-report</li> <li>Pay stub</li> <li>Texas Workforce Commission database</li> <li>The Work Number</li> </ul>	<ul style="list-style-type: none"> <li>Measured continuously, ~180 days after employment is verified</li> <li>180-day job retention must be verified during the reporting period to be counted.</li> </ul>

ADVANCEMENT	<p>Number of individuals who secured employment during the current reporting period or past reporting period who achieved one of the following indicators of advancement:</p> <ul style="list-style-type: none"> <li>• Promotion along an identified career path at a business</li> <li>• Increase in hourly wage or salary</li> <li>• Increase in hours worked each month</li> <li>• Improved working conditions (better hours or benefits)</li> </ul>	<ul style="list-style-type: none"> <li>• Client self-report</li> <li>• Employer self-report</li> <li>• Pay stub</li> <li>• Texas Workforce Commission database</li> <li>• The Work Number</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously</li> <li>• Advancement must be verified during the reporting period to be counted.</li> </ul>
ESL SERVICES	<p>Number of <b>unduplicated</b> individuals who enrolled in an ESL course provided through your organization in order to improve written and spoken English language proficiency, life skills, and cultural competency.</p> <p><i>ESL is expected to be delivered in a classroom setting or on-line via a credible software product. ESL education should be supervised by program staff or trained volunteers.</i></p>	<ul style="list-style-type: none"> <li>• Classroom attendance rosters</li> <li>• Case management logs</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously</li> <li>• ESL attendance must be verified during the reporting period to be counted.</li> </ul>
ESL: IMPROVEMENT OR COMPLETION	<p>Number of <b>unduplicated</b> individuals who accessed ESL SERVICES who improved by at least one level during the reporting period</p> <p>Literacy levels are defined by the National Reporting System for the following assessments:</p> <ul style="list-style-type: none"> <li>• Test of Adult Basic Education Complete Language Assessment System - English (TABE CLAS-E)</li> <li>• Comprehensive Adult Student Assessment System (CASAS)</li> <li>• Basic English Skills Test (BEST)</li> </ul>	<ul style="list-style-type: none"> <li>• Internal proficiency assessments</li> <li>• Standardized assessments such as the TABE CLAS-E, CASAS, or BEST</li> <li>• Classroom attendance rosters</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at the conclusion of each ESL term</li> <li>• Improvement or completion must be verified during the reporting period to be counted.</li> </ul>
ADULT BASIC EDUCATION SERVICES	<p>Number of <b>unduplicated</b> individuals who accessed an Adult Basic Education course provided through your organization that helps a person improve reading proficiency, writing proficiency, math proficiency, and/or earn a GED.</p> <p><i>Adult Basic Education is expected to be delivered one-on-one, in a classroom setting or on-line via a credible software product. Adult</i></p>	<ul style="list-style-type: none"> <li>• Classroom attendance rosters</li> <li>• Case management logs</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously</li> <li>• Adult basic education participation must be verified during the reporting period to be counted.</li> </ul>

	<i>Basic Education should be supervised by program staff or trained volunteers.</i>		
ADULT BASIC EDUCATION: IMPROVEMENT OR COMPLETION	<p>Number of <b>unduplicated</b> individuals who accessed ADULT BASIC EDUCATION SERVICES who improved by at least one level in the areas of either writing, reading, or math during the reporting period, OR</p> <p>Literacy levels are defined by the National Reporting System for the following assessments:</p> <ul style="list-style-type: none"> <li>• Test of Adult Basic Education (TABE)</li> <li>• Comprehensive Adults Student Assessment System (CASAS)</li> <li>• Wonderlic General Assessment of Instructional Needs (Wonderlic GAIN)</li> <li>• The Wide Range Achievement Test (WRAT)</li> </ul>	<ul style="list-style-type: none"> <li>• Internal proficiency assessments</li> <li>• Standardized assessments such as the TABE, CASAS, Wonderlic GAIN, WRAT</li> <li>• Classroom attendance rosters</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at the conclusion of each Adult Basic Education term</li> <li>• Improvement or completion must be verified during the reporting period to be counted.</li> </ul>
VOCATIONAL TRAINING SERVICES	<p>Number of individuals who accessed a vocational training course provided through your organization in order to earn an industry-relevant credential, certificate, or skill.</p> <p><i>Examples of VOCATIONAL TRAINING SERVICES include, but are not limited to:</i></p> <ul style="list-style-type: none"> <li>• <i>Construction skills</i></li> <li>• <i>Information technology / A+ Certification</i></li> <li>• <i>Healthcare occupations</i></li> <li>• <i>Manufacturing occupations</i></li> <li>• <i>Forklift operation</i></li> <li>• <i>Commercial Driver's License (CDL)</i></li> <li>• <i>Child Care Skills Training</i></li> </ul> <p><b>Special Case: Training Support Programs:</b> <i>Clients who access case management-intensive programs that help individuals navigate, enroll in, and complete vocational training programs offered by external training providers can be included.</i></p>	<ul style="list-style-type: none"> <li>• Classroom attendance rosters</li> <li>• Case management logs</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously</li> <li>• Vocational training participation must be verified during the reporting period to be counted.</li> </ul>

	<i>Special Case: Two Training Programs: If a client accesses two vocational training programs during the reporting period, you can count both in the VOCATIONAL TRAINING SERVICES number.</i>		
VOCATIONAL TRAINING COMPLETION	<p>Number of individuals who accessed VOCATIONAL TRAINING SERVICES who completed the vocational training program.</p> <p>The definition for completion will vary by vocational training program, but should generally include some combination of pre-defined attendance, skill proficiency, and/or achievement requirements.</p> <p><i>Special Case: Two Training Programs: If a client completes two vocational training programs during the reporting period, you can count both in the VOCATIONAL TRAINING COMPLETION number.</i></p>	<ul style="list-style-type: none"> <li>• Classroom attendance rosters</li> <li>• Case manager notes</li> <li>• Proficiency assessments, if appropriate</li> </ul>	<ul style="list-style-type: none"> <li>• Measured at the conclusion of each vocational training program.</li> <li>• Completion must be verified during the reporting period to be counted.</li> </ul>

## Income – Financial Stability

FINANCIAL EDUCATION SERVICES	<p>Number of <b>unduplicated</b> individuals who accessed a financial education course offered through your organization in order to increase financial literacy.</p> <p><i>Financial education services should be delivered in one of the following ways:</i></p> <ul style="list-style-type: none"> <li>• Classroom setting</li> <li>• One-on-one with a financial educator</li> <li>• On-line via a credible software product</li> </ul> <p><i>Financial education should be supervised by program staff or trained volunteers.<sup>4</sup></i></p>	<ul style="list-style-type: none"> <li>• Classroom attendance rosters</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously</li> <li>• Financial education access must be verified during the reporting period to be counted.</li> </ul>
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<sup>4</sup> Types of services pulled from Common Outcomes Survey Report Question 10 regarding the definition of Job Placement Services.

	<p>A list of recommended curricula can be found at <a href="http://www.mymoneydfw.com/partner-resources/">http://www.mymoneydfw.com/partner-resources/</a></p>		
FINANCIAL COACHING SERVICES	<p>Number of <b>unduplicated</b> individuals who accessed one-on-one financial coaching services offered through your organization that help individuals set and make progress towards financial goals.</p> <p><i>Financial coaching is expected to be delivered one-on-one by one of the following individuals:</i></p> <ul style="list-style-type: none"> <li>• Financial coach</li> <li>• Financial counselor trained in financial coaching techniques.</li> <li>• Case manager trained in financial coaching techniques</li> <li>• Volunteer trained in financial coaching techniques.</li> </ul> <p><i>Common financial goals include:</i></p> <ul style="list-style-type: none"> <li>• Increasing income</li> <li>• Building emergency savings</li> <li>• Reducing debt</li> <li>• Improving credit</li> <li>• Saving for retirement or asset purchase</li> </ul>	<ul style="list-style-type: none"> <li>• Case management / financial coaching notes</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously</li> <li>• Financial coaching access must be verified during the reporting period to be counted.</li> </ul>
IMPROVED FINANCIAL CAPABILITY	<p>Number of <b>unduplicated</b> individuals who accessed FINANCIAL COACHING SERVICES who show an improvement on the Financial Capability Scale during the reporting period.</p> <p>Improved Financial Capability can be determined by comparing Financial Capability Scale score at intake with the most recent Financial Capability Scale score.</p> <ul style="list-style-type: none"> <li>○ <b>Example:</b> If a client starts the program with a Financial Capability Scale score of 3, improves Financial Capability Scale score to 6, but then drops their Financial Capability Scale score to 5, the client should be included in IMPROVED FINANCIAL CAPABILITY since 5 &gt; 4.</li> </ul>	<ul style="list-style-type: none"> <li>• Programs must use the Financial Capability Scale evaluation tool to measure this outcome.</li> </ul>	<ul style="list-style-type: none"> <li>• Financial Capability Scale verification can coincide with scheduled financial coaching sessions</li> <li>• Financial Capability Scale improvement must be verified</li> </ul>

<p>INCREASED SAVINGS</p> <p>MODIFIED as of January 2018</p>	<p>Number of <b>unduplicated</b> individuals who report increased savings.</p> <p><b>Defining Increase:</b> Increased savings occurs when an individual’s savings at the most recent verification is higher than the client’s savings score at initial verification.</p> <ul style="list-style-type: none"> <li>• <b>Example:</b> If a client starts the program with \$0 in savings, builds up to \$500 in savings, but then cuts down to \$300 in savings, the client should still be included in the INCREASED SAVINGS measure since \$300 is greater than \$0 (even though savings has recently declined)</li> </ul> <p><b>Important points on SAVINGS:</b></p> <ul style="list-style-type: none"> <li>• Savings is defined as money that is deliberately set aside by the client for future use.<sup>5</sup></li> <li>• Savings can include money that is acquired via a match program as long as the match is part of savings (if the match is spent on an asset purchase, it no longer should be included as savings).</li> <li>• Reduced spending and/or increased wages do NOT count as increased savings if the client does not actually save the increased amount.</li> </ul>	<ul style="list-style-type: none"> <li>• Bank account statements</li> <li>• Client self-reports</li> <li>• <i>Note: Positive savings is only expected to be monitored for clients who identify savings as a financial goal.</i></li> </ul>	<ul style="list-style-type: none"> <li>• The timing of savings balance verification will typically coincide financial coaching sessions</li> <li>• POSITIVE SAVINGS must be verified during the reporting period to be counted in an outcome report.</li> </ul>
<p>AVERAGE SAVINGS AMOUNT – BASELINE</p> <p>MODIFIED as of January 2018</p>	<p>The <i>average</i> amount of savings at intake (or first verification) among clients who were included in the POSITIVE SAVINGS measure.</p> <p><b>How to Calculate:</b> A program helped five clients save money. At baseline, the five clients had savings amounts of \$0, \$200, \$400, \$600, and \$8,000, respectively. Therefore, the AVERAGE SAVINGS AMOUNT - BASELINE that should be reported is \$400.</p> <p>If baseline savings cannot be determined for a client that you are able to help save, please use a baseline value of 0.</p>		

<sup>5</sup> United Way does not specify where savings must be kept, though a separate FDIC-insured account is recommended. Savings does not include savings offered to a client due to lowering expenses such as bills or increasing income.

	<ul style="list-style-type: none"> <li>• <b>Example:</b> If a program helps a client purchase a \$100 savings bond during tax season but not able to verify baseline savings or provide additional follow up, the program should use \$0 for the baseline and \$100 as the verification amount.</li> </ul>		
<p>AVERAGE SAVINGS AMOUNT – MOST RECENT VERIFICATION</p> <p>MODIFIED as of January 2018</p>	<p>The <i>average</i> amount of savings at the most recent verification among clients who were included in the POSITIVE SAVINGS measure.</p> <p><b>How to Calculate:</b> A program helped five clients save money. At the most recent verification, the five clients had savings amounts of \$200, \$400, \$600, \$800, and \$1,000, respectively. Therefore, the AVERAGE SAVINGS AMOUNT – MOST RECENT VERIFICATION that should be reported is \$600.</p>		
<p>IMPROVED CREDIT SCORE</p> <p>MODIFIED as of January 2018</p>	<p>Number of <b>unduplicated</b> individuals who report an improvement in their credit score.</p> <p><b>Defining Improvement:</b> Credit score improvement occurs when an individual’s credit score at the most recent verification is higher than the client’s credit score at initial verification.<sup>6</sup></p> <ul style="list-style-type: none"> <li>• <b>Example:</b> If a client starts the program with a 550 credit score, builds up to a 650 credit score, but then drops to a 600 credit score, that client should be included in CREDIT SCORE IMPROVEMENT since 600 is greater than 550.</li> </ul> <p><b>Consistency:</b> Be sure to compare credit scores from the same source when comparing baseline and follow up values. For example, if a you help a client check their credit score at baseline through TransUnion, continue to use TransUnion to measure the client’s credit score improvement.</p>	<p><b>Credit Score Sources</b></p> <ul style="list-style-type: none"> <li>• Credit Karma</li> <li>• Credit Wise</li> <li>• Nerdwallet.com</li> <li>• Discover</li> <li>• TransUnion</li> <li>• Experian</li> <li>• Equifax</li> </ul> <p><i>Note: Credit score improvement is only expected to be monitored for clients who identify credit score improvement as a financial goal.</i></p>	<ul style="list-style-type: none"> <li>○ The timing of FICO credit score verification will typically coincide with scheduled financial coaching sessions.</li> <li>○ Credit score must be verified during the reporting period to be counted in an outcome report.</li> </ul>

<sup>6</sup> United Way is proposing this specific definition because we believe that achieving an improved credit score overall is more important than demonstrating increases during every reporting period.

	<p><b>Unscored:</b> If a client is unscored, do not consider credit score improved until the client is able to establish a credit score (and then use the newly established credit score as the baseline value).</p>		
<p>AVERAGE CREDIT SCORE – BASELINE</p> <p>MODIFIED as of January 2018</p>	<p>The <i>average</i> credit score at intake (or first verification) among clients who were included in the IMPROVED CREDIT SCORE measure.</p> <p><b>How to Calculate:</b> A program helped 5 clients improve credit. At baseline, the five clients had credit scores of 500, 550, 600, 650, and 700, respectively. Therefore, the AVERAGE CREDIT SCORE – BASELINE that should be reported is 600.</p>		
<p>AVERAGE CREDIT SCORE – MOST RECENT VERIFICATION</p> <p>MODIFIED as of January 2018</p>	<p>The <i>average</i> credit score at the most recent verification among clients who were included in the IMPROVED CREDIT SCORE measure.</p> <p><b>How to Calculate:</b> A program helped 5 clients improve credit. At most recent verification, the five clients had credit scores of 550, 600, 650, 700, and 750, respectively. Therefore, the AVERAGE CREDIT SCORE – MOST RECENT VERIFICATION that should be reported is 650.</p>		
<p>NON-MORTGAGE DEBT REDUCTION</p> <p>MODIFIED as of January 2018</p>	<p>Number of <b>unduplicated</b> individuals who reduce non-mortgage debt.</p> <p><b>What Counts as Non-Mortgage Debt?</b></p> <ul style="list-style-type: none"> <li>• Credit card debt</li> <li>• Medical debt</li> <li>• Student loan debt</li> <li>• Backed rent and utility payments</li> <li>• Peer debt (owe money to family or friends)</li> <li>• Payday loan debt</li> </ul> <p><b>Defining Debt Reduction:</b> Non-mortgage debt reduction occurs when an individual’s amount of unsecured debt at the most recent</p>	<ul style="list-style-type: none"> <li>○ Non-mortgage debt must be verified by a financial coach or case manager, preferably using a debt management tool completed by a client and supported by debt statements</li> <li>○ Example of a debt management tool in CFPB’s Your Money</li> </ul>	<ul style="list-style-type: none"> <li>○ The timing of non-mortgage debt reduction verification will typically coincide with scheduled financial coaching sessions.</li> <li>○ Non-mortgage debt amount must be verified during the reporting period to be counted in an outcome report.</li> </ul>

	<p>verification is lower than the client’s amount of non-mortgage debt at initial verification.<sup>7</sup></p> <ul style="list-style-type: none"> <li>○ <b>Example:</b> if a client enters the program with \$2,000 in non-mortgage debt, reduces non-mortgage debt to \$1,000, but then increases non-mortgage debt to \$1,500, that client should be included in NON-MORTGAGE DEBT REDUCTION because \$1,500 is less than \$2,000.</li> </ul>	<p>Your Goals Toolkit (p. 169):  <a href="http://files.consumerfinance.gov/f/201407_cfpb_your-money-your-goals_toolkit_english.pdf">http://files.consumerfinance.gov/f/201407_cfpb_your-money-your-goals_toolkit_english.pdf</a></p> <ul style="list-style-type: none"> <li>○ <i>Note: Debt reduction is only expected to be monitored for clients who identify debt reduction as a financial goal.</i></li> </ul>	
<p>AVERAGE NON-MORTGAGE DEBT – BASELINE</p> <p><b>MODIFIED as of January 2018</b></p>	<p>The <i>average</i> non-mortgage debt at intake (or first verification) among clients who were included in the NON-MORTGAGE DEBT REDUCTION measure.</p> <p><b>How to Calculate:</b> A program helped 5 clients reduce non-mortgage credit. At baseline, the five clients had non-mortgage debt amounts of \$500, \$750, \$1,000, \$1,250, and \$1,500, respectively. Therefore, the AVERAGE NON-MORTGAGE DEBT - BASELINE that should be reported is \$1,000.</p>		
<p>AVERAGE NON-MORTGAGE DEBT – MOST RECENT VERIFICATION</p> <p><b>MODIFIED as of January 2018</b></p>	<p>The <i>average</i> non-mortgage debt at most recent verification among clients who were included in the NON-MORTGAGE DEBT REDUCTION measure.</p> <p><b>How to Calculate:</b> A program helped 5 clients reduce non-mortgage credit. At most recent verification, the five clients had non-mortgage debt amounts of \$0, \$250, \$500, \$750, and \$1,000, respectively. Therefore, the AVERAGE NON-MORTGAGE DEBT – MOST RECENT VERIFICATION that should be reported is \$500.</p>		

<sup>7</sup> United Way is proposing this specific definition because we believe that the overall act of achieving and maintaining reduced debt amounts is more important than constantly reducing debt during each reporting period.

BENEFITS SCREENING SERVICES	<p>Number of individuals who accessed a benefits screening service provided through your organization that helps a person identify and apply for public benefits.</p> <p><i>Examples of benefits screening services include, but are not limited to:</i></p> <ul style="list-style-type: none"> <li>• <i>YourTexasBenefits.com</i></li> <li>• <i>Community Partner Program</i></li> <li>• <i>YW Self-Sufficiency Calculator</i></li> </ul>	<ul style="list-style-type: none"> <li>• Case management notes</li> <li>• Benefits screening summary provided through software</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously</li> <li>• Benefits screening services must be verified during the reporting period to be counted.</li> </ul>
BENEFITS ACCESS	<p>Number of individuals who accessed BENEFITS SCREENING SERVICES who enrolled in one of the following public benefits:</p> <ul style="list-style-type: none"> <li>• Supplemental Nutrition Program (SNAP)</li> <li>• Nutrition Program for Women, Infants, and Children (WIC)</li> <li>• Temporary Assistance for Needy Families (TANF)</li> <li>• Supplemental Security Income (SSI)</li> <li>• Social Security Disability Insurance (SSDI)</li> <li>• Children’s Health Insurance Program (CHIP) / Medicaid</li> <li>• Head Start</li> <li>• Utility Assistance</li> <li>• Phone Assistance</li> <li>• School Meals</li> </ul>	<ul style="list-style-type: none"> <li>• Client self-report</li> <li>• Benefit documentation</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously during follow-up or financial coaching sessions</li> <li>• Benefits access must be verified during the reporting period to be counted</li> </ul>
FREE TAX PREPARATION	<p>Number of individuals who accessed free tax preparation services through your organization.</p>	<ul style="list-style-type: none"> <li>• Intake</li> <li>• Case management logs</li> <li>• TaxWise software (for VITA providers)</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously</li> <li>• Free tax preparation service utilization must be verified during the reporting period to be counted.</li> </ul>
UNBANKED TO BANKED <b>*NEW*</b>	<p>Number of UNBANKED individuals who open an FDIC insured account to become BANKED</p>	<ul style="list-style-type: none"> <li>• Case management logs</li> <li>• Documentation</li> </ul>	<ul style="list-style-type: none"> <li>• Measured continuously during follow-up or financial coaching sessions</li> </ul>