

North Penn United Way

2012-15 INVESTMENT PLAN

**ALL RESIDENTS HAVE A
STRONG SAFETY NET**



North Penn United Way

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North Penn United Way (NPUW) is pleased to announce its 2012-15 plan for investing dollars and leadership to help more North Penn and Indian Valley individuals and families have their basic needs met.

INTRODUCTION: A NEW INVESTMENT PLAN AND PROCESS

This document is part of a comprehensive plan to ensure United Way dollars, leadership, and partnerships make the greatest and most lasting difference in the lives and neighborhoods of North Penn and Indian Valley residents who face the greatest barriers to self-sufficiency and well-being.

- A. We have sharpened our focus to **3 Community Goals** to anchor all investments:
- Students Succeed in School
 - Older Adults are as Independent and Community-Connected as Possible
 - Residents have a Strong Safety Net
- B. We will make three-year investments in a **strategic mix of programs and initiatives** aligned with these Goals.
- C. We are committed to **Results-Based Accountability*** (RBA):
- Assessing the performance of all NPUW program and initiative investments in changing customer lives and thus contributing to the Community Goal
 - Tracking measurable indicators at the overall population level for the first two Community Goals (where change will require community-wide investments and efforts beyond those of NPUW and its partners) and seek additional partners and system strategies to expand the “reach” of safety net supports.
- D. Program awards will thus reflect applicant proposals that best demonstrate the following **investment criteria**:
- Alignment with one of our 3 Community Goals
 - Alignment with targeted customers, strategies, and North Penn/Indian Valley locations presented in the Investment Plan for each Goal
 - Proposed programs that are evidence-based and/or considered “best practice” models
 - Solid process of measuring service quantity, quality and customer results (*Student and Older Adults goals*); service quantity, quality, and customer satisfaction (*Safety Net goal*)
 - Demonstrated capacity to yield positive customer results and/or satisfaction.
- E. The ***investment process*** will also have the following changes:
- Additional agencies will be eligible to apply for program funding (all those successfully completing the NPUW “Qualification Standards” process), and
 - Awards will be based on competitive scoring per the aforementioned investment criteria, with no pre-determined or historically-based amounts to be considered for any program or agency.

* RBA is a framework authored by Mark Friedman and presented in his book *Trying Hard is Not Good Enough: How to Produce Measurable Improvements for Customers and Communities*. See website @www.resultsaccountability.com and pages 8 & 9 for United Way testimonials.

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DEVELOPMENT OF THE INVESTMENT PLAN

1. This plan represents a continued North Penn United Way commitment to help meet the needs of local citizens in crisis or emergency situations, even as we seek long-term solutions for “turning the curve” on how many children enter school ready to learn, how many K-12 students succeed in school, and how many older adults are as independent and community-connected as possible.
2. We are defining “Safety Net” as a *community web* of one-time or short-term supports for persons in emergency need of basic life necessities (including food, shelter, clothing, medical care, and safety) due to poverty, disaster, or violence/crime.
3. To help determine (a) *the best way for NPUW to invest dollars* in safety net programs/services and special initiatives and (b) *the best way for NPUW to provide leadership* around safety net challenges,
 - We secured data about local citizens living in poverty, the higher-than-average cost of living in Montgomery County, the vulnerability of human services funding streams, and the increased demand for crisis assistance. *See page 6.*
 - We invited the larger community to give input to these questions during a Safety Net Strategy Session on December 6, 2011. *See page 7 for a roster of the 21 participants.*
 - And we assessed the impact opportunities associated with our leadership of the “Money in Your Pocket”/VITA (Volunteer Income Tax Assistance) initiative, as well as our partnership role with the Montgomery County Tax Coalition, Montgomery County Homeless Prevention Steering Committee, and the Community Nutrition Coalition.
4. This process has produced the *NPUW Investment Plan* presented on the following page. This plan targets residents in need of safety net services with a *target population* being persons facing homelessness, domestic violence, and poverty.

North Penn United Way
2012-15 Investment Plan
Community Goal: All Residents Have a Strong Safety Net



Help Individuals and Families Overcome Crises and Meet Their Basic Needs

Help Our Community Transition from One That Manages Homelessness to One That Decreases It

<p>Target PROGRAM Strategies for NPUW investment</p> <p>Target Population: Persons Facing Homelessness, Abuse, and Poverty</p> <p>Priority SYSTEMS Strategies for NPUW investment</p>	<ul style="list-style-type: none"> • Provide emergency food • Provide emergency shelter • Provide immediate response and short-term supports for victims of domestic violence 	<ul style="list-style-type: none"> • Provide transitional supports for persons who are homeless or without adequate/permanent housing, helping them secure and maintain stable housing
<p>KEY PERFORMANCE MEASURES for Programs & Initiatives (Results-Based Accountability)</p>	<ul style="list-style-type: none"> • Strengthen financial sufficiency supports, such as the “Money in Your Pocket”/VITA initiative, to reach more low income citizens and provide stronger links to skills and resources to prevent individual/family crises • Help local providers better coordinate, integrate, and expand targeted safety net supports 	<ul style="list-style-type: none"> • Help build a more coordinated and seamless system of helping persons secure and maintain stable housing • Advocate for increased subsidized and affordable housing
<p>LONG-TERM PERFORMANCE MEASURES for Community Strategies to Decrease Homelessness (RBA)</p>	<ul style="list-style-type: none"> ✓ Customers experience timely response to needs/requests ✓ Customers experience quality services or supports ✓ Customers express satisfaction with programs/services/support ✓ The general public is aware of the program and how to access support ✓ Customer data is tracked and shared to support advocacy efforts related to “root cause” issues and/or level of need throughout the North Penn and Indian Valley areas 	
	<ul style="list-style-type: none"> ✓ Increase in the number of affordable housing units ✓ Decrease in the number of homeless children, adults, families ✓ Decrease in the tenure of persons in homeless shelters 	

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IMPLEMENTATION OF THE PLAN: NORTH PENN UNITED WAY ROLES

- Invest in the most promising and aligned PROGRAM strategies via a “Request for Proposals” process.
- Promote communication and coordination among local PROGRAMS that provide targeted safety net supports.
- Act as a catalytic partner in seeking SYSTEM strategies that help move our community from managing homelessness to decreasing homelessness.
- Strengthen the “Money in Your Pocket”/VITA initiative to reach more citizens and to provide stronger links to financial stability skills and resources to prevent crisis.
- Explore the most compelling ways that Volunteer Connections (the NPUW volunteer center) might support both PROGRAM and SYSTEMS strategies, including goal-focused engagement of faith communities, advocacy groups, and local businesses.
- Increase community awareness efforts related to the needs of the homeless, victims of domestic violence, and individuals and families living in poverty.

Note: It is a formidable challenge to strengthen investments in services and interventions that begin before birth and change lives for the long term, while at the same time supporting programs that meet people at the point of crisis. North Penn United Way absolutely desires to join the community in providing a reliable safety net, while affirming a priority focus on strategic actions to improve the lives of children, teens, and older adults in ways that minimize the likelihood of their becoming impoverished or homeless.

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SNAPSHOT OF LOCAL DATA RELATED TO THIS GOAL

- Five percent (5%) or almost 1,000 North Penn/Indian Valley families with children lived below the **poverty level** in 2010 (*Claritas Inc. 2010 Census*). “Poverty level” was defined by the US Department of Health and Human Services as \$22,050 for a family of four (4) regardless of location within the United States.
- A far more realistic view of poverty is presented by the **PA Financial Self-Sufficiency Standard** (FSSS), an annual income deemed necessary for a basic and decent level of living in each PA county. For 2010, the FSSS for a family of four (4) in Montgomery County was \$71,393. (www.pathwayspa.org)
- The reality of **economic hardship** is illustrated by the fact that a family must work 116 hours/week at 2010 minimum wage (\$7.25) to afford the average rent for a basic two-bedroom Montgomery County apartment (\$1,211/month), assuming the family is spending 30% of their income on housing.
- There has been a steady rise in the percent and number of **poor K-12 students** (*free/reduced lunch eligibility*) in both school districts in the last 5 years (2006-2010): from 10 to 17% (1,441 to 2,238 students) in North Penn School District and from 9 to 13% (611 to 873 students) in Souderton Area School District. (*PA Department of Education*)
- As the economy has weakened, **financial challenges for families have been compounded** – lower incomes, higher unemployment, increased cost of living, and scarcity of affordable housing.
- Both public and private **non-profits are facing decreases in revenue** from government at all levels, foundations, and donors.

*To be added: trend data re: local residents living in poverty;
local data related to emergency food request/provision, homelessness and domestic violence*

**North Penn United Way
Safety Net Strategy Team Members 2011**

Name

Affiliation

Tom	Allebach	Manna on Mainstreet
Vanessa	Briggs	Health Promotion Council
Ken	Byler	Higher Ground Consulting Group
Dave	Crosson	Indian Creek Foundation
Mark	Cummins	Harleysville Insurance
Kristyn	DiDominick	Manna on Mainstreet
Larry	Feibert	Family Services of MontCo Assoc ED
Tracey	Ford	Consumer Credit Counseling Services
Ron	Geib	Harleysville Savings
Davis	Johnson	NPCHF
Mark	Leiberman	Family Services of Montgomery County
Betty	Linko	NP YMCA
Tamala	Luce	NP Community Health Foudation
Nadine	Miller	MC Children & Youth
Shushma	Patel	Family Services of Montco Co
Delton	Plank	Lower Salford Township
Ella	Roush	Greater NP Collaborative for Health/Human Services
Blair	Rush	National Penn
Joseph	Sludden	Red Cross
Beth	Sturman	Laurel House
Kathleen	Thomas	Montco Office of Children and Youth



Results Based Accountability Testimonials from Local United Ways

Results-Based Accountability (RBA), as defined in the book, “Trying Hard is Not Good Enough,” is a framework for producing measurable improvements for customers and communities. A growing number of United Ways and other funders across the country are using RBA to achieve community improvements in education, income and health. Below are comments from some of the United Ways that are leading the way:

“RBA is such a clear and easily understood method for identifying the change we want to see in our communities and then for making a realistic plan to achieve that change. We have used RBA with our community partners to successfully reduce binge drinking among teens and young adults and to reduce childhood obesity in our county. The precision and discipline of RBA has made us favorably competitive for national foundation and government grants. I highly recommend RBA to United Ways.”

**Mary Lou Goeke, Executive Director
United Way of Santa Cruz County (CA)**

“The goal of all of our United Way community impact efforts is to improve the lives of people in our communities. The RBA process is a strategic, time-efficient, ongoing, easy to understand, and measureable way by which we can ensure that the efforts we undertake to help people are resulting in the outcomes we seek.”

**Ted Granger, President
United Way of Florida**

“Results Based Accountability provides a framework for the kind of long-term thinking required to truly change community conditions. The RBA structure enabled us within a six month time frame to realign our community impact agenda around Education, Income and Health and at the same time, build a culture of measurement and shared accountability for results. Through a community driven process we selected four population results and their key indicators. We then used the concept of performance measures to help guide our contract negotiations with our community impact partners. We now have the ability to track, improve and report the results of our strategies on a quarterly basis. Results Based Accountability helped us accelerate our community impact agenda.”

**Dan Duncan, Senior Vice President of External Relations
United Way of Tucson and Southern Arizona**



"United Way of Central Iowa has utilized Results Based Accountability (RBA) methods for the past several years. Using RBA with community partners helps us to look at what they will do and who is better off, ultimately helping us measure towards community goals. The evolution of this work has allowed us to reach common measures for focus areas and has allowed for a greater common understanding of the work across the community. Recently UWCI adopted the Results Scorecard which feeds RBA information into a common dashboard, allowing us to see progress on program performance measures of partners and how the collective is advancing the common good by reaching our community goals. We are extremely excited about this tool as a way to share with our staff, board and community partners about progress on our collective work to turn the curve."

Nicole M. Beaman, MSW, LISW
Vice President of Community Impact
United Way of Central Iowa

"One of the reasons that the North Penn United Way has chosen to use Results Based Accountability (RBA) is the fact that it provides a systematic yet simple to use platform to determine community and agency goals and to attain community level and agency level results. We believe that the simple and common language approach is crucial to the unified work of multiple agencies and organizations. The education and training of RBA will allow the community and the agencies to develop just a few results as well as indicators of those results so that we all can gauge the effectiveness of their work. We are looking forward to how this will assist our community in addressing its needs and turning the curve with results. We are also excited to be able to make more strategic investment decisions."

Cheryl Clarke, Director of Community Impact
North Penn United Way (PA)

"The need to achieve results and accountability within the nonprofit sector has become the measuring stick for success. Utilizing the RBA framework has helped me develop a greater understanding of what it takes to improve the performance of programs, agencies, and service systems."

Mark Johnson, Vice President,
Community Funding and Special Initiatives
United Way of South Hampton Roads (VA)

"Results Based Accountability helps us to refocus and concentrate our energy on what we want to achieve in the community and to tailor our strategies to make that happen. It will also enable us to demonstrate our effectiveness to investors and gives us the data we need to build the capacity and effectiveness of funded agencies and other partners."

Diane R. Bessel, PhD, LMSW, CNM
Director of Community Impact
United Way of Buffalo & Erie County (NY)

"Using the Results Based Accountability Framework has been tremendously significant in the work we do in the central Maryland region. We have been able to clearly and succinctly articulate our results in the areas of Education, Income and Health. Having offered community trainings to our partners, we are working with community partners to achieve those results. Equally important is the fact that we are able to show our funders, stakeholders and the general public the impact of our work - how much we are doing, how well we are doing our work, the number of people who are better off, and the positive changes in our communities"

Marian Amoa
Assistant Director, Outcomes & Evaluation
United Way of Central Maryland (UWCM)

"We decided to marry our Community Impact model to RBA some years ago, and this journey continues to bring focus and direction to how we plan, partner, invest, and hold both our grantees and ourselves accountable for making a difference. Most recently, a board member sponsored an after-work celebration to honor 19 agencies with programs receiving a "high green" rating for RBA performance. Key stakeholders and donors are looking to our United Way to spread this kind of "partnership with accountability" throughout the nonprofit community."

Janice Lovegrove, Vice President, Community Impact
United Way of the Greater Lehigh Valley (PA)

"Our United Way is just at the beginning of using RBA. RBA is a tool that we can (and will) use with our agencies and grants process to ensure we are getting the expected results. Or if we are not getting the results, to be able to recognize this and make appropriate adjustments."

Anne Bryant
Executive Director
Franklin-Southampton Area United Way (VA)

For more information on how to get started,
please contact:



www.resultsleadership.org

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