

2012 INVESTMENT GUIDELINES BASIC NEEDS



**United Way
for Southeastern Michigan**

**AGENDA FOR CHANGE INVESTMENT GUIDELINES
BASIC NEEDS
2012**

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AGENDA FOR CHANGE
Creating Stable Families
Introduction
Basic Needs 2012 Investment Guidelines and Strategies

Vision

A thriving and vibrant Southeastern Michigan where all individuals and families are financially stable, economically empowered, and self-sufficient.

Mission

Support individuals and families to become empowered to move from crisis to self-sufficiency by providing access to basic needs and pathways to jobs and financial stability.

Goal

Individuals and families are empowered to access and navigate the services and resources that promote self-sufficiency and provide guidance in getting there.

Theory of Change

The Theory of Change that United Way is supporting is that in order to make greater Detroit a top five city to live and work by 2030, individuals and families must have the ability to be self-sufficient. To get our region there, we must create pathways for vulnerable individuals and families to be helped in times of need and become empowered with the mindset that they can make the future be better than the past. These individuals and families will go on to support vibrant thriving communities, stabilizing and improving the neighborhoods around them.

Guiding Principles

- Concentration of all resources on ensuring individuals and families have access to support during times of crisis and resources to empower them to achieve self-sufficiency.
- Emphasis on movement from crisis towards thriving
- Focus on results
- Leave a lasting impact on systems and communities

To that end, we are supporting results-oriented projects, programs and supportive services that are delivered to individuals and families using an approach that provides access to basic resources, assistance in navigating the safety net to access additional resources, and the support to move along the continuum towards self-sufficiency and financial stability.

Structure of Investments

In order to leverage our resources and provide a greater benefit to the community at large, UWSEM has begun to invest in supporting the movement of individuals and families along a continuum—from crisis to stability and on to self-sufficiency. In order to provide this full scope of services, Basic Needs and Financial Stability will view their investment strategies in terms of movement along this continuum, with Basic Needs supporting the first half of movement (from crisis to sufficiency) and Financial Stability supporting the second half (from sufficiency to sustainable self-sufficiency).

In addition to aligning our work in Financial Stability and Basic Needs, UWSEM is also examining how to leverage our investments in order to create the largest impact for a relatively small amount of resources. By selecting communities where UWSEM has already begun to support and engage agencies, we can further the impact of our investments. In all strategies, priority will be given to organizations in communities with established UWSEM initiatives (where there is a Target High School, Early Learning Community, or Center for Working Families).

Measuring Change

UWSEM will begin to measure the impact of our investments by standardizing our measurement tool. UWSEM will be using a variation of the Arizona Self-Sufficiency Matrix to measure the impact of our investments on individuals and families in the community. UWSEM's full variation will be available for partner use in July 2012.

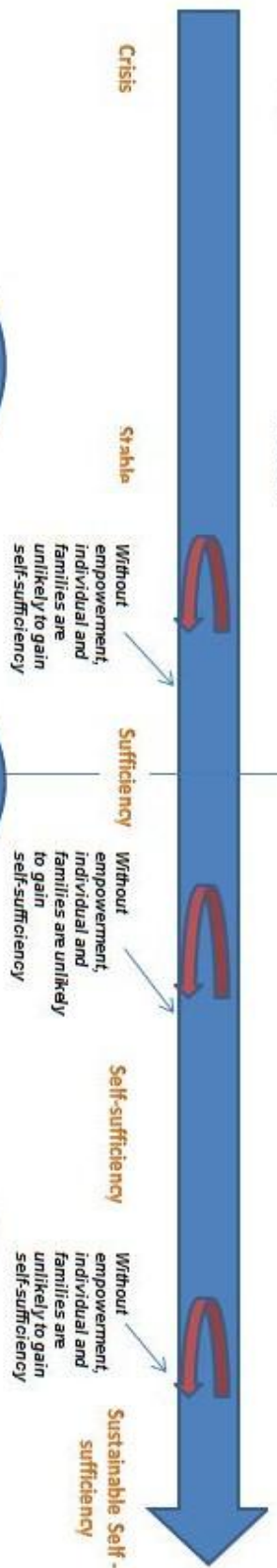
For more information, please see Appendix A.

FINANCIALLY STABLE FAMILIES THE ROADMAP FROM CRISIS TO SELF-SUFFICIENCY

Empowering families to move from crisis to self-sufficiency by providing access to basic needs and pathways to jobs and financial stability

Characteristics

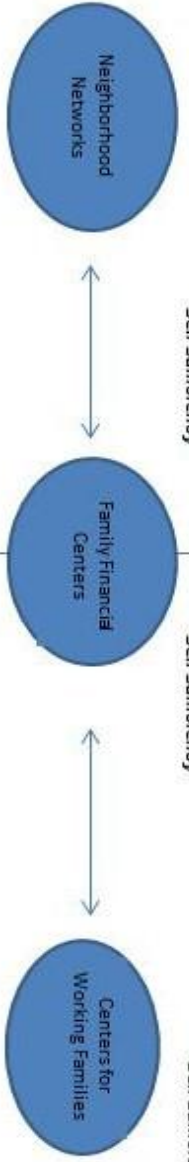
- Has an immediate need which can impact well-being
- Has access to immediate temporary supports and resources
- Can meet all of their basic needs with assistance
- Can pay all their bills with limited assistance
- Can pay all bills and put some funds away for the future.



Empowerment points - A point in the process where people gain control over their own lives, their communities, and in their society

Increase in the number of families that are moving towards self-sufficiency

Outcomes



BASIC NEEDS

FINANCIALLY STABLE

Overview

FOCUS

Create an investment process that is:

- Providing client centered approaches to service provision.
- Removing barriers to access and navigation of services.
- Integrating services to solve for the crisis and put individuals and families on a path towards self-sufficiency.
- Fueled by the creation of networks to meet a variety of needs in the community.
- Outcome driven, with specific metrics tied to the self-sufficiency matrix.

INVESTMENT OUTCOMES

United Way will use the following as indicators that our investments have been successful:

- Household income is sufficient and well managed.
- Family has safe, adequate and affordable housing.
- The household can choose to purchase the food their family needs.
- The household has a way to provide for all basic needs of healthy daily living.
- Family has the mindset that you can make the future better than the past¹.

GOALS AND METRICS

United Way will use a Self-Sufficiency Matrix to measure client movement from crisis to self-sufficiency.

- Reduce hunger by 50% in our target communities by connecting our region's organizations, individuals and families with the information and resources needed to increase access to quality nutritional food.
- Increase the number of individuals and families served that have moved along the continuum from crisis to self-sufficiency.
- Reduce the number of eligible individuals and families who do not access benefits/services.

INVESTMENT STRATEGIES

Key findings from an extensive study to understand the characteristics and components of the social safety net in our region showed:

- That a majority of the safety net services and funding are aimed at helping customers fulfill their basic needs rather than achieving or maintaining self-sufficiency;
- The need for an outcome orientation to focus on programs demonstrating measurable impact;
- The importance of focusing on recovery and prevention to a) prevent individuals and families from entering the safety net and b) provide access to services that allow for "recovery" to self-sufficiency;
- The significance of federal benefits going unclaimed – nearly \$1 billion.

Based on dollars currently available, UWSEM will invest 6.3 million dollars in Basic Needs. Investments will potentially be allocated across Strategies in the following amounts:

Strategy 1: Neighborhood Networks - 1.5 Million

Strategy 2: Regional Alliances – 1.5 Million

Strategy 3: Bridging the Gap – 2.3 Million

Strategy 4: Food Best Practices - .5 Million

Strategy 5: Innovation² - .5 Million

Agencies may apply for as many strategies as they are qualified for. UWSEM will not penalize agencies for applying to multiple strategies. However, UWSEM will work to reduce duplication of services among agencies.

¹ Metrics for this outcome is currently in development.

² Resources set aside for Innovation will be used to address emerging issues, programs or practices as UWSEM

STRATEGY 1: NEIGHBORHOOD NETWORKS – PILOT

UWSEM believes that to become a top 5 place to live and work by 2030 we need to build strong families that live in vibrant and safe communities. To this effort, our focus is on education, financial stability, and basic needs to improve the social safety net. Our Educational Preparedness has created Early Learning Communities, targeted 12 High Schools and is working to improve graduation rates. Our Financial Stability work has created Centers for Working Families to create pathways to jobs and lead to financial stability.

To test out our proof of concept - Basic Needs will initially leverage our current work by investing in the creation of Neighborhood Networks in the zip codes surrounding the High Schools.* While we intend to use the Target High Schools as a proxy for geography, UWSEM will also consider strong Neighborhood Networks outside of these geographic areas. Our goal is that a variety of service providers will come together to create a system of supportive services within targeted neighborhoods with a focus on moving individuals and families towards self-sufficiency, and empowering individuals with the mindset that they can make the future better than the past.

*See Appendix C for corresponding zip codes.

DEFINITION OF A NEIGHBORHOOD NETWORK

A Neighborhood Network is a group comprised of non-profits, for-profits, public and private institutions who exchange information or services among individuals, groups or institutions; who cultivate productive relationships and exchanges with a common goal—providing for the basic needs of the neighborhood and increasing the self-sufficiency of the individuals and families who live there.

Each network is responsible for determining the activities they will engage in. While some networks may focus solely on systems change, others may combine both systems change and direct client services, as long as there is a continued emphasis on systems and capacity building within the network. For a full listing of activities which directly support basic needs, see appendix D.

UWSEM is not interested in funding a collaboration of agencies that will merely provide services and share information. UWSEM will invest in Neighborhood Networks that use a variety of innovative/best and or promising practice approaches that ultimately help struggling families so that they are empowered to move towards self-sufficiency. While coordination of services is important, UWSEM will give priority to Networks that are not independently providing services, but incorporating new strategies to form a comprehensive system of care for struggling families in the Neighborhood. Networks are expected to create formalized processes to strengthen their ability to track individuals and families as they move through the continuum from crisis to self-sufficiency.

Neighborhood Networks are encouraged to include public as well as private institutions, for profit and non-profit groups and may include organizations who are not receiving UWSEM support.

- Preference will be given to networks that include a variety of organizations, including for-profit partners, government agencies, representatives of the faith-based communities, agencies providing direct services and case management, and financial management or education.

Neighborhood Networks can include collaborations which are currently receiving support from UWSEM, as well as existing or new networks which are not currently supported by UWSEM.

STRUCTURE OF NETWORK

Networks must have a clearly defined and agreed upon plan that speaks to the responsibility of each partner and includes: governance, decision-making, conflict resolution and communication protocols, and a signed statement of partnership/agreement of responsibilities/MOU.

Networks will also be given liaison/facilitator support provided by UWSEM to help build the network.

Lead Agency

Each network will identify a single 501c3 organization to act as the Lead Agency. The Lead Agency of the network must meet UWSEM's criteria for a stellar partner, including showing leadership and community presence, capacity to deliver on outcomes and strong financial management track record (See Appendix B). Lead agencies must have participated as a partner agency in good standing during UWSEM's 08-11 funding cycle.

Lead agencies will be responsible for:

- In collaboration with partners, creating a formal operating structure that includes a Steering Committee.
- Convening regular meetings of the network to share best practices and discussion of concerns.
- Compiling reports from collaborative members to submit to UWSEM.
- Acting as UWSEM's primary point of contact for the Network.
- Ensuring all members of the Network adhere to the partnership agreement.

Lead agencies will also receive additional investments for their role as "lead" and the corresponding responsibilities and costs, including additional staffing support to meet the needs of the network

Neighborhood Network Plan

The Network will create and submit to UWSEM for consideration a plan that is developed and agreed upon by all members. *This plan will be reviewed by UWSEM as a portion of the application for funding.* The plan must outline the following:

Operating Structure

- Designated Lead Agency/Fiduciary, and proposed Partners.
- Description of Partner responsibilities and assets (ability to leverage financial and other resources).
- Description of a formal operating structure addressing governance, decision making, measurement, conflict resolution, and communication protocols.

Network Functions:

- Explanation of the primary issues in the neighborhood, including data to support
- Description of how the Network will work to address the primary issues of the neighborhood including
 - Description of how the Network will identify needs, address issues, and remove barriers.
 - Description of how individuals and families will move through the network of services (access and navigation).
 - Description of how the Network will gather stakeholder input and engage the community.
 - Description of how the Network will inform/educate public policy, and how it will advocate on behalf of the neighborhood served.

NETWORK CRITERIA

Neighborhood Networks should be able to demonstrate the following baseline criteria:

Capacity

- Evidence based work
- Show the network's potential viability through leveraged funds, as well as additional resources (both in-kind and financial).
- Capacity to report, meet and work in collaboration with partner agencies working toward communal outcomes and communal deliverables and one agency acting as the lead.
- Capacity to ensure that individuals and families have access to benefits to both public and private benefits.
- Inform/educate public policy and advocate on the behalf of the neighborhood served.
- Demonstrate that that services and activities of the Network have a marked improvement on the self-sufficiency of the individuals and families in the neighborhood community as a whole
- Provide client-centered support in their neighborhood.
- Capacity to measure and track client data and network activities

Innovation and Best Practices

- Articulate better use of existing resources
- Connect resources where they are not connected.
- New ideas that help to meet the theory of change.
- Be encouraged to focus on the issues most important to their neighborhood. This includes focusing the activities of the network as well as the partners (for example, if the main concern of the neighborhood is housing, at least one partner should be a housing organization).
- Demonstrate best practices or promising practices (local, national and international) to remove barriers for accessing assistance and movement of individuals and families from crisis to self-sufficiency

- Continually engage the community to gather stakeholder input and inform activities of the Network

Efficiencies

- Demonstrate efficient, integrated service delivery.
- Contact and work with other existing leadership groups in the neighborhood.
- Work to eliminate duplication and promote “warm transfers” to improve client service experience.

Deliverables and Outcomes:

- Development of a logic model describing how to move more individuals and families from crisis to self-sufficiency
- Improve the self-sufficiency of individuals and families overall.
- Increase the number of individuals and families served that have moved along the continuum from crisis to self-sufficiency.
- Increase the number of individuals and families accessing benefits (public and private) and services on their journey towards self-sufficiency.
- Demonstrate how the network has been effective in collectively moving clients through the service provider network through an integrated services model.
 - This includes providing case coordination among network partners as well as outside organizations, and promoting systems change³ to allow clients to more easily access services or move out of the safety net.
- Depending on the nature of the network, additional outcomes may be required.
- Engage in a yearly assessment of the partnership, partner strengths, gaps in the partnership and movement toward the shared outcomes.
- Long term deliverable: Develop a realistic sustainability plan for continued viability of the network.

Metrics and Indicators:

UWSEM will be using a Self-Sufficiency Matrix (see appendix A) to measure the impact of the network on individual clients served. Everyone in the network will have to be able to track the movement of individuals and families along this matrix. *If an organization/network is using another form of a self-sufficiency matrix that measures similar dimensions, they may present it to UWSEM for approval. UWSEM will provide networks with the support needed to effectively evaluate the success in meeting their deliverables and achieve measurable outcomes for their neighborhoods.

- Number and/or percent of individuals and families that have progressed along the continuum between each of UWSEM’s five major categories (see appendix A).
- Number and/or percent of individuals and families that have become “Self-Sufficient”.
- Number and/or percent of individuals and families that have regressed along the continuum⁴.

Depending on the nature and activities of the network, additional metrics may be required.

Eligibility and Timeframes:

Neighborhood networks may include for profit, governmental, faith-based and other agencies or organizations. All non-501c3 organizations must work with a 501c3 as a fiduciary for their investment. Organizations may participate in the network without receiving formal financial investments from UWSEM.

UWSEM will convene groups of service providers interested in participating in this strategy in January and February of 2012. These sessions will be participant driven and will provide the opportunity for conversations and network building among potential collaborators. By the time of the application, the network will be expected to have identified the partners and identified a lead agency. See timeline for details. Only one network is expected to apply per High School neighborhood.

³ UWSEM loosely defines systems change as an adaptive network of structures, processes, and relationships grounded in systems of care values and principles that provides individuals and families with access to and availability of necessary services and supports across administrative and funding jurisdictions

⁴ UWSEM recognizes that individuals and families may regress along the continuum, and that a single family may cycle through the entire continuum from crisis to sustainable self-sufficiency before achieving on- going success in leaving the safety net.

While organizations will be invited to participate, potential partners that meet the criteria can complete an online profile by first calling 313-226-9316 or sending an email to investment.information@liveunitedsem.org. 501c3 organizations and for-profit entities will be considered depending on the strategy.

WHILE UWSEM HAS PROVIDED THE ABOVE FRAMEWORK, WE ARE OPEN TO OTHER INNOVATIVE APPROACHES TO FORMING A STRONG NEIGHBORHOOD NETWORK.

Investment Range and Funding Cycle

- One application will be submitted by the Neighborhood Network.
- Investments will be provided in most instances to the individual partners in the network based on the Neighborhood Network Plan, although in some cases the Lead Agency will be asked to act as the fiduciary for one or more partner, particularly for partners who are not currently affiliated with UWSEM or are not a 501c3.
- All member agencies of the network will dedicate at least a portion of an employee's time to promoting the activities of this network (meeting attendance, case sharing, committee participation and activities).
- Not every partner in the network will necessarily receive funding.
- In 2012-2013, three neighborhoods will be supported at \$100,000 to \$500,000 per Neighborhood Network, depending on nature of strategies proposed. This investment includes support for the following resources:
 - Support for individual partners' capacity and infrastructure to maintain network activities and goals.
 - Additional resources for Lead agencies for their role as "lead" and the corresponding responsibilities and costs, including support for an FTE to meet the needs of the work.
 - Support of an outside evaluator to work with the Network and UWSEM.

The funding cycle will run for two years (2012-2014), with a possible third year of funding based on an overall evaluation of the success of the network approach and available resources.

This strategy is not intended for long term investment. UWSEM anticipates supporting a network that will build and continue to be sustainable after our investment ends.

As this is a pilot program, UWSEM and the Neighborhood Networks may need to adjust the parameters of the above criteria in order to achieve the goals of this strategy.

STRATEGY 2: REGIONAL ALLIANCES

UWSEM will continue to support alliances and collaborations that seek to improve social systems on a regional level. While in the past alliances were established across regional boundaries to improve the delivery of services, Regional Alliances will be required to take steps towards systems change.

Each alliance is responsible for determining the activities they will engage in. While some alliances may focus only on systems change, others may combine both systems change and direct client services, as long as there is a continued emphasis on systems. For a full listing of activities which support basic needs, see appendix D.

STRUCTURE OF THE REGIONAL ALLIANCE

Lead Agency

Each network will identify a single 501c3 organization to act as the Lead Agency. The Lead Agency of the alliance must meet UWSEM's criteria for a stellar partner, including showing leadership and community presence, capacity to deliver on outcomes and strong financial management track record (See Appendix B). Lead agencies must have participated as a partner agency in good standing during UWSEM's 08-11 funding cycle.

Lead agencies will be responsible for:

- In collaboration with partners, creating a formal operating structure that includes a Steering Committee.
- Convening regular meetings of the alliance to share best practices and discussion of concerns.
- Compiling reports from collaborative members to submit to UWSEM.
- Acting as UWSEM's primary point of contact for the Alliance.
- Ensuring all members adhere to the partnership agreement.

Regional Alliances can include collaborations which are currently receiving support from UWSEM as well as existing or new alliances which are not currently supported by UWSEM.

Regional Alliance Plan:

Each group of agencies submitting an application as an alliance will create and submit to UWSEM for consideration a plan that is developed and agreed upon by all members. *This plan will be reviewed by UWSEM as a portion of the application for funding.* The plan must outline the following:

Operating Structure

- Designated Lead Agency, and proposed Partners.
- Description of Partner responsibilities and assets (ability to leverage financial and other resources).
- Description of a formal operating structure addressing governance, decision making, measurement, conflict resolution, and communication protocols.

Regional Alliance Functions:

- Explanation of the primary issues to be addressed by the alliance, including data to support
- Description of how the alliance will work to address the primary issues of the region including:
 - Description of how the Alliance will identify needs, address issues, and remove barriers.
 - Description of how the Alliance will gather stakeholder input and engage the community.
 - Description of how the Alliance will inform/educate public policy, and how it will advocate on behalf of the system.

REGIONAL ALLIANCES CRITERIA

Alliances seeking investment for this strategy should be able to demonstrate the following baseline criteria:

Capacity

- Regional Alliances must have a clearly defined and agreed upon plan that speaks to the responsibility of each partner and includes: governance, decision-making, conflict resolution and communication protocols, and a signed statement of partnership/agreement of responsibilities/MOU.
- Reporting, meeting and work will be done as an alliance, with member agencies working toward communal outcomes and communal deliverables.
- Regional Alliances will show the Alliance’s potential viability through leveraged funds, as well as additional resources (both in-kind and financial).
- Inform/educate public policy and advocacy on the behalf of population served or issues being addressed by the alliance.

Innovation and Best Practices

- Alliances will demonstrate best practices or promising practices (local, national and international) towards systems change; remove barriers for accessing assistance and movement of individuals and families from crisis to self-sufficiency.

Efficiencies

- Demonstrate improved efficiencies, such as operational, service provision or systems change.
- Sharing of information among member groups about best practices, innovation or new ideas.

Deliverables and Outcomes:

- Description of how more individuals and families are moving from crisis to self-sufficiency by creating a logic model
- Demonstrate how the Regional Alliance is improving the safety net.
- Address systems change across the region.
- Demonstrate client movement towards self-sufficiency on the matrix as a result of the systems change.
- Improve the self-sufficiency of individuals and families overall.
- Increase the number of individuals and families served that have moved along the continuum from crisis to self-sufficiency.
- Increase the number of individuals and families accessing benefits (public and private) and services on their journey towards self-sufficiency.
- Increase the number of individuals empowered the mindset that they can make the future better than the past.

- Engage in a yearly assessment of the partnership, member strengths, gaps in the membership and movement toward the shared outcomes.

Metrics and Indicators:

- Alliances will be required to demonstrate movement towards improved systems that have potential to impact the larger social system⁵.
- Alliances may also be asked to utilize the self-sufficiency matrix (see appendix A) to demonstrate one or more of the following:
 - Number and/or percent of individuals and families that have progressed along the continuum between each of UWSEM’s five major categories (see appendix A).
 - Number and/or percent of individuals and families that have become “Self-Sufficient”.
 - Number and/or percent of individuals and families that have regressed along the continuum⁶.

Investment Range and Funding cycle

- One application will be submitted by the Regional Alliance.
- Funding will be awarded on a three year cycle, with funding dependent on meeting deliverables and available resources.
- A single member of the Alliance must be selected to act as the fiduciary for the investment for all alliance members. While the lead agency does not need to act as the fiduciary, the fiduciary must have participated as a partner agency in good standing during UWSEM’s 08-11 funding cycle.
- In 2012-2013, the size of the investment may vary due to number of partners and activities proposed.

Eligibility

UWSEM defines “region” as reaching across all three counties of Southeastern Michigan (Macomb, Oakland and Wayne counties), although strong applications which include agencies from two or fewer counties may still apply. Alliances which propose to operate only within a single city will not be considered.

While currently funded partners will be invited to participate, potential partners that meet the criteria can complete an online profile by first calling 313-226-9316 or sending an email to investment.information@liveunitedsem.org. 501(c)(3) organizations and for-profit entities will be considered depending on the strategy.

WHILE UWSEM HAS PROVIDED THE ABOVE FRAMEWORK WE ARE OPEN TO OTHER INNOVATIVE APPROACHES TO ADDRESSING SYSTEMS CHANGE.

STRATEGY 3: BRIDGING THE GAP

While the Neighborhood Networks will provide place-based resources, additional services may be needed in Southeastern Michigan which does not meet the requirements of the Neighborhood Networks. For a full listing of activities which support basic needs, see appendix D.

BRIDGING THE GAP CRITERIA

Agencies seeking investment for this strategy should be able to demonstrate the following baseline criteria:

Capacity

- Provide an integrated service delivery model that is client-centered to support individuals and families.
- Demonstrate an ability to track client progress data.
- Demonstrate the ability to empower individuals with the mindset that they can make the future be better than the past.

Innovation and Best Practices

⁵ UWSEM loosely defines systems change as an adaptive network of structures, processes, and relationships grounded in systems of care values and principles that provides individuals and families with access to and availability of necessary services and supports.

⁶ UWSEM recognizes that individuals and families may regress along the continuum, and that a single family may cycle through the entire continuum from crisis to sustainable self-sufficiency before achieving on- going success in leaving the safety net.

- Demonstrate best practices or promising practices (local, national and international) to remove barriers for accessing assistance and movement out of the safety net system.

Efficiencies

- Demonstration of a strong network of relationships and linkages in community to ensure individuals and families are getting access to services that are moving people to self-sufficiency.
- Contact and work with other existing leadership groups in the community.
- Work with other service providing agencies by connecting individuals and families to other service providers, provide warm transfers and follow up.
- Show the program's potential viability through leveraged funds, as well as additional resources (both in-kind and financial).

Deliverables and Outcomes:

- Improve the self-sufficiency of individuals and families overall
- Increase in the number of individuals and families served that have moved along the continuum from crisis to self-sufficiency.
- Increase in the number of individuals and families accessing benefits (public and private) and services.
- Maintain and expand network of relationships and linkages in community to ensure individuals and families are getting access to services that are moving people to self-sufficiency.
- Inform/educate public policy and advocate on the behalf of the populations served.

Metrics:

UWSEM will be using a Self-Sufficiency Matrix (see appendix A) to measure the impact of the program on individual clients served. Agencies will have to be able to track the movement of individuals and families along this matrix. *If an agency/network is using another form of a self-sufficiency matrix that measures similar dimensions, they may present it to UWSEM for approval. Measurements may include:

- Number and/or percent of individuals and families that have progressed along the continuum from "Crisis" to "Sufficient"
- Number and/or percent of individuals and families that have become "Self-Sufficient"
- Number and/or percent of individuals and families that have regressed along the continuum.

Investment Range and Funding cycle

The funding cycle will run for two years (2012-2014) with funding dependent on meeting deliverables and available resources.

In 2012-2013, programs on average will be supported at no more than \$300,000 per program. The size of the investment may vary due to activities proposed.

Eligibility

- Priority will be given to programs which are already working in conjunction with other United Way initiatives, including Early Learning Communities or Centers for Working Families.
- Programs which offer a variety of services and move clients along the full continuum from crisis to self-sufficiency will be given priority.
- Agencies looking to provide services in the same area as a selected Neighborhood Network may be required by UWSEM to integrate with the local Neighborhood Network.
- Agencies interested in investment for this strategy must meet UWSEM's definition of a stellar agency (see appendix B) and submit a logic model describing how they will move individuals and families towards self-sufficiency.
- While collaborations of multiple organizations are encouraged to apply for Regional Alliance or Neighborhood Network strategies, collaborative applications may still be submitted for the Bridging the Gap strategy.

While organizations will be invited to participate, potential partners that meet the criteria can complete an online profile by first calling 313-226-9316 or sending an email to investment.information@liveunitedsem.org. 501c3 organizations and for-profit entities will be considered depending on the strategy.

Strategy 4: Food Best Practices

UWSEM will continue to invest in practices that help those in need access the food resources necessary to feed their families, with the goal of reducing hunger by 50%. While additional innovative approaches to closing the hunger gap may be considered, United Way is specifically interested in supporting the following programs:

Program Option 1: Improve Access to Emergency Food Resources and Improve Access to Food Benefits

United Way will invite qualified partners to become a part of the Food Initiative, which focuses on the integration and expansion of 1) emergency food distribution and 2) improved access to food related benefits.

We are looking for organizations that already have a clear business line in food distribution and/or benefits access. The business line must already be well resourced. In addition to one of these two lines of business, we are looking for organizations that have existing client choice pantries or mobile pantries, with capacity to provide case management services to provide access to other benefits and resources.

Qualification baseline to receive an invitation:

Organizations that want to be considered must have one of the two lines of business already in place at the time of submission. In addition organizations must be able to meet UWSEM standard criteria, along with the following:

- Tracking mechanism in place.
- Serving a geographic area in a UWSEM target geography
 - Oakland: Brandon, Ferndale, Hazel Park, Madison Heights, Oak Park, Pontiac, Southfield, Waterford
 - Out-Wayne: Allen Park, Dearborn, Dearborn Heights, Ecorse, Hamtramck, Harper Woods, Highland Park, Inkster, Lincoln Park, Livonia, Melvindale, Redford, River Rouge, Romulus, Southgate, Taylor, Trenton
 - Macomb: Center Line, Clinton Township, Eastpointe, Fraser, Mt. Clemens, New Haven, Roseville, St. Clair Shores, Warren
 - Detroit: (including but not limited to) Brightmoor, Osborn, Southwest
- Capacity to provide case management services and assist with providing access to other benefits and resources.
- Strategies for providing services and linkages with UWSEM Turn-around schools, Centers for Working Families (CWF) and/or Early Learning Communities (ELC).
- Ability to mobilize networks in support of UWSEM policy platform.
- Preference will be given to organizations who already are supporting low income persons through child nutrition feeding programs, Michigan Benefits Access Initiative site, VITA site, Early Learning Community or Center for Working Families.
- Preference will be given to organizations with client choice pantries or mobile pantries.

Metrics Criteria

Potential organizations must have the capacity to track and measure the following:

- Number of individuals and families served
- % of individuals and families receiving access to benefits
- Types of benefits accessed
- Number of meals served
- Must be able to show that they have a diversified budget to ensure program sustainability beyond the grant period.

Deliverables

- Data – Agency will track and report increases in number of meals/people served by:
 - Zip Code
 - Age Demographic (i.e. children, seniors, etc.)
- Dissemination of outreach materials promoting child nutrition programs, including, but not limited to, Summer Food Service Program (SFSP), Child and Adult Care Food Program (CACFP), School Breakfast Program (SBP) and the Women, Infant and Children Program (WIC).
- Agency will increase number of child meals served through programs by at least 10% annually.
- Agency will incorporate referral services to their distribution efforts, including but not limited to, developing a formal relationship with an MBI site. This also includes becoming a 2-1-1 referral agency.
- Agency will actively participate in at least one Hunger Free SEMI network.

- Special consideration will be provided to those organizations that are able to source at least 10% of their total amount of distributed food locally

Eligibility

Invitation only process. This may include currently funded organizations as well as those not currently receiving UWSEM funding.

- 501(c)(3) organizations are eligible.
- Priority focus will be on those organizations that have the capacity to provide client-centered services that connect individuals and families with access to emergency food, as well as supportive services that provide access to benefits.
- Programs in this strategy that also take place in one of UWSEM's Neighborhood Networks will be required to work with the network to ensure resources are used efficiently and services are coordinated as much as possible for clients.

While organizations will be invited to participate, potential partners that meet the criteria can complete an online profile by first calling 313-226-9316 or sending an email to investment.information@liveunitedsem.org. 501(c)(3) organizations and for-profit entities will be considered depending on the strategy.

Potential investment range:

Up to \$150,000 per year, access to Emergency Food and Shelter Program (EFSP) network and training opportunities, MBI resources, training and technical support.

Program Option 2: Support for Child Nutrition programs

School based nutrition programs offer substantial support and relief for children facing hunger. Any student who is eligible for free or reduced price lunch is eligible for a number of other child nutrition programs, but many are not getting healthy meals throughout the day. Our community views school communities as untapped opportunities to connect families with resources available.

As part of our efforts to increase nutrition and food access in SEM, we are seeking to partner with agencies to support the startup and expansion of programs geared towards providing nutritious meals to more students through the federal School Breakfast Program, the Child and Adult Care Food Program (CACFP), and the Summer Food Service Program (SFSP).

Qualification baseline to receive an invitation:

Organizations that want to be considered must currently have partnerships with school districts and have access to students during the school day at the time of submission. In addition, organizations must be able to meet UWSEM standard criteria, along with the following:

- Tracking mechanism in place.
- Serving a geographic area in a UWSEM target geography
 - Oakland: Brandon, Ferndale, Hazel Park, Madison Heights, Oak Park, Pontiac, Southfield, Waterford
 - Out-Wayne: Allen Park, Dearborn, Dearborn Heights, Ecorse, Hamtramck, Harper Woods, Highland Park, Inkster, Lincoln Park, Livonia, Melvindale, Redford, River Rouge, Romulus, Southgate, Taylor, Trenton
 - Macomb: Center Line, Clinton Township, Eastpointe, Fraser, Mt. Clemens, New Haven, Roseville, St. Clair Shores, Warren
 - Detroit: (including but not limited to) Brightmoor, Osborn, Southwest
- Strategies for providing services and linkages with UWSEM Turn-around schools, Centers for Working Families (CWF) and/or Early Learning Communities (ELC).
- Ability to mobilize networks in support of UWSEM policy platform.
- Preference will be given to groups with substantial ties to a school district and commitment to will-building among school district personnel and families (example, PTA)

Metrics Criteria

Potential organizations must have the capacity to track and measure the following:

- Number of individuals served

- Number of meals served
- Must be able to show that they have a diversified budget to ensure program sustainability beyond the grant period.

Deliverables

- Demonstrable increase in participation of current sites (at least 10%) or an increase in the number of sites within target communities (at least 5 additional sites)
- Dissemination of outreach materials promoting child nutrition programs, including, but not limited to, Summer Food Service Program (SFSP), Child and Adult Care Food Program (CACFP), School Breakfast Program (SBP) and the Women, Infant and Children Program (WIC).
- Agree to attend UWSEM meetings convened to provide information on best practices, policy updates and strategy planning
- Data – Agency will track and report site specific information as well as the number of meals/people served by:
 - Program information
 - Number of sites, including new sites
- Days of operation, Meals Offered and Times Offered, Site Contact Info, Contracted Food Vendor
 - Zip Code
 - Age Range Served

Eligibility

Invitation only process. This may include currently funded organizations as well as those not currently receiving UWSEM funding.

- 501(c) (3) organizations are eligible.
- Priority focus will be on those organizations that have the capacity to provide client-centered services that connect individuals and families with access to emergency food, as well as supportive services that provide access to benefits.
- Programs in this strategy that also take place in one of UWSEM's Neighborhood Networks will be required to work with the network to ensure resources are used efficiently and services are coordinated as much as possible for clients.

While organizations will be invited to participate, potential partners that meet the criteria can complete an online profile by first calling 313-226-9316 or sending an email to investment.information@liveunitedsem.org. 501(c)(3) organizations and for-profit entities will be considered depending on the strategy.

Potential Investment range:

Up to \$10,000 per year, access to UWSEM Food Team personnel and training opportunities.

Program Option 3: SuperSites

For children facing hunger, uncertainty is a constant companion. Providing consistency and certainty of meals is a priority for UWSEM. Programs that offer feeding sites year round will offer this security to their community. Coupled with additional community enrichment activities, a consistent meal site will draw in children for support and nutrition year round. UWSEM proposes to provide support for both the meal site and the sponsor in order to provide nutritious, delicious and attractive food in a child-friendly environment with additional programming to support children and youth.

Qualification baseline to receive an invitation:

Organizations that want to be considered must have an established community presence with access to a wide variety of children and families. Food services and programming must be open to all who qualify for SFSP and after school snack. In addition organizations must be able to meet UWSEM standard criteria, along with the following:

- For Sponsors:
 - A willingness to serve more than one SFSP site
 - Coordination of non-food programming, such as educational enrichment or physical education programming.
- For sites:
 - Capacity to serve 150 children.

- Capacity to provide SFSP breakfast and lunch in summer and After-School Snack during the school year
- Offer at least one complementary educational enrichment program, including mentoring, tutoring, and other after school supportive services, etc.
- For both sponsors and sites:
 - Tracking mechanism in place.
 - Serving a geographic area in a UWSEM target geography
 - Oakland: Brandon, Ferndale, Hazel Park, Madison Heights, Oak Park, Pontiac, Southfield, Waterford
 - Out-Wayne: Allen Park, Dearborn, Dearborn Heights, Ecorse, Hamtramck, Harper Woods, Highland Park, Inkster, Lincoln Park, Livonia, Melvindale, Redford, River Rouge, Romulus, Southgate, Taylor, Trenton
 - Macomb: Center Line, Clinton Township, Eastpointe, Fraser, Mt. Clemens, New Haven, Roseville, St. Clair Shores, Warren
 - Detroit: (including but not limited to) Brightmoor, Osborn, Southwest
 - Strategies for providing services and linkages with UWSEM Turn-around schools, Centers for Working Families (CWF) and/or Early Learning Communities (ELC).
 - Ability to mobilize networks in support of UWSEM policy platform.
 - Open their sites to all children, with no pre-registration requirement
 - Are willing to commit to coordinating/providing at least one meal a day, each day of the year (excluding holidays).
- Preference will be given to groups that
 - Participate in either the Summer Food Service program OR a Federal Child Nutrition Program that supports After School Snack and/or Supper (higher preference will be given to groups that already provide both).
 - Have formal community partnerships which provide afterschool enrichment or volunteers.
 - Are willing to commit to an outreach campaign collaboration with UWSEM to promote the food programming provided.
 - Are willing to commit to engaging in training and expansion opportunities offered by the Food System Navigators.

Eligible activities include but are not limited to

- Staffing costs related to food programming
- Training costs related to food programming
- Food program capacity building equipment
- Start-up costs for expanding or creating a food program including
 - Contract with a transportation service to transport the food
 - Contract with a meal service to deliver food
- Costs associated with providing food for children during weekends and holidays, such as providing take-home packs.

Metrics Criteria

Potential organizations must have the capacity to track and measure the following:

- Number of individuals served
- Number of meals served
- Must be able to show that they have a diversified budget to ensure program sustainability beyond the grant period.

Deliverables

- Agency will form at least 1 Supersite within a target community, which will provide a summer food (SFSP) program as well as an afterschool/holiday food program open to all eligible children in a target community
- Agency's Supersite will provide referral services to an MBI or CWF, or Supersite will be a direct service MBI partner site
- Dissemination of outreach materials promoting child nutrition programs, including, but not limited to, Summer Food Service Program (SFSP), Child and Adult Care Food Program (CACFP), School Breakfast Program (SBP) and the Women, Infant and Children Program (WIC)
- Agency will create a formal link to an emergency food provider to provide additional meal access to the families of the children utilizing the site

- Data – Agency will track and report increases in number of meals/people served by:
 - Zip Code
 - Age Demographic (i.e. children, seniors, etc.)
- Agency's supersite will provide meals to no less than 100 children per day between the combination of programs offered

Eligibility

Invitation only process. This may include currently funded organizations as well as those not currently receiving UWSEM funding.

- 501(c)(3) organizations are eligible.
- Priority focus will be on those organizations that have the capacity to provide client-centered services that connect individuals and families with access to emergency food, as well as supportive services that provide access to benefits.
- Programs in this strategy that also take place in one of UWSEM's Neighborhood Networks will be required to work with the network to ensure resources are used efficiently and services are coordinated as much as possible for clients.

While organizations will be invited to participate, potential partners that meet the criteria can complete an online profile by first calling 313-226-9316 or sending an email to investment.information@liveunitedsem.org. 501(c)(3) organizations and for-profit entities will be considered depending on the strategy.

Potential Investment ranges:

Up to \$50,000 per year, access to UWSEM Food Team personnel and training opportunities.

Funding Model Recommendations

- As in 2008, there will be no base allocation guarantees for current funded agencies and previous allocation will not be considered a factor when making 2012 funding decisions.
- No transitional funding will be available for current partners that will not receive funding in 2012. Currently funded agencies that are not selected for investment in 2012 will continue to receive any funds that are donor designated.

TIMELINE

Month	Activity
January 2012	<ul style="list-style-type: none"> ○ All Strategies: Potential partners invited to apply for funding in Basic Needs strategies ○ Neighborhood Network: Group meetings of potential organizations ○ Neighborhood Networks: Request for Qualifications opens 1/20/12
February 2012	<ul style="list-style-type: none"> ○ Regional Alliances, Bridging the Gap and Food: Application process for begins 2/1/12 ○ Bridging the Gap: Logic model training for interested agencies will be held 2/7/12 ○ Regional Alliances, Bridging the Gap and Food: Webinars and in-person sessions will be held to provide clarification and instructions for completing the application will take place the week of 2/6/12 ○ Neighborhood Networks: Request for Qualifications closes 2/15/12 ○ Neighborhood Networks: Interviews with potential in late February and early March ○ Regional Alliances and Bridging the Gap: Applications process closes 2/29/12
March 2012	<ul style="list-style-type: none"> ○ All Strategies: First phase of investment reviews ○ All Strategies: Conversations between UWSEM and potential partners around outcomes
April 2012	<ul style="list-style-type: none"> ○ All Strategies: Investment reviews continue ○ All Strategies: Conversations between UWSEM and potential partners around outcomes continue
May 2012	<ul style="list-style-type: none"> ○ All Strategies: Partners notified ○ All Strategies: “Open” inquiry for 2012-2013 funding begins
June 2012	<ul style="list-style-type: none"> ○ All Strategies: Agreements are returned from partners ○ All Strategies: “Open” inquiry for 2012-2013 funding continue

July 2012	<ul style="list-style-type: none">○ All Strategies: Funding begins○ All Strategies: “Open” inquiry for 2012-2013 funding continue○ Neighborhood Networks: meet regularly and develop partnership agreements with the support of UWSEM staff
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Appendix A:
The Self-Sufficiency Matrix

UWSEM will be using a variation of the Arizona Self-Sufficiency Matrix to measure the impact of our investments on individuals and families in the community. UWSEM's full variation will be available for agency use in July 2012. Until this time, agencies are encouraged to use the Arizona Matrix as a proxy when planning for the 2012 investment cycle.

The following is specific information on the Arizona Matrix:

In the Arizona Self-Sufficiency matrix, 15 domains are used to measure self-sufficiency. An individual client's status on each domain is measured by a 5 point scale. Data is collected upon program entry and at program exit. For some longer-term programs, data is collected every six months after entry and again at exit. Additional information on the matrix is available below and at

https://www.azdes.gov/uploadedFiles/Aging_and_Adult_Services/Community/ssm_decision_tree.pdf

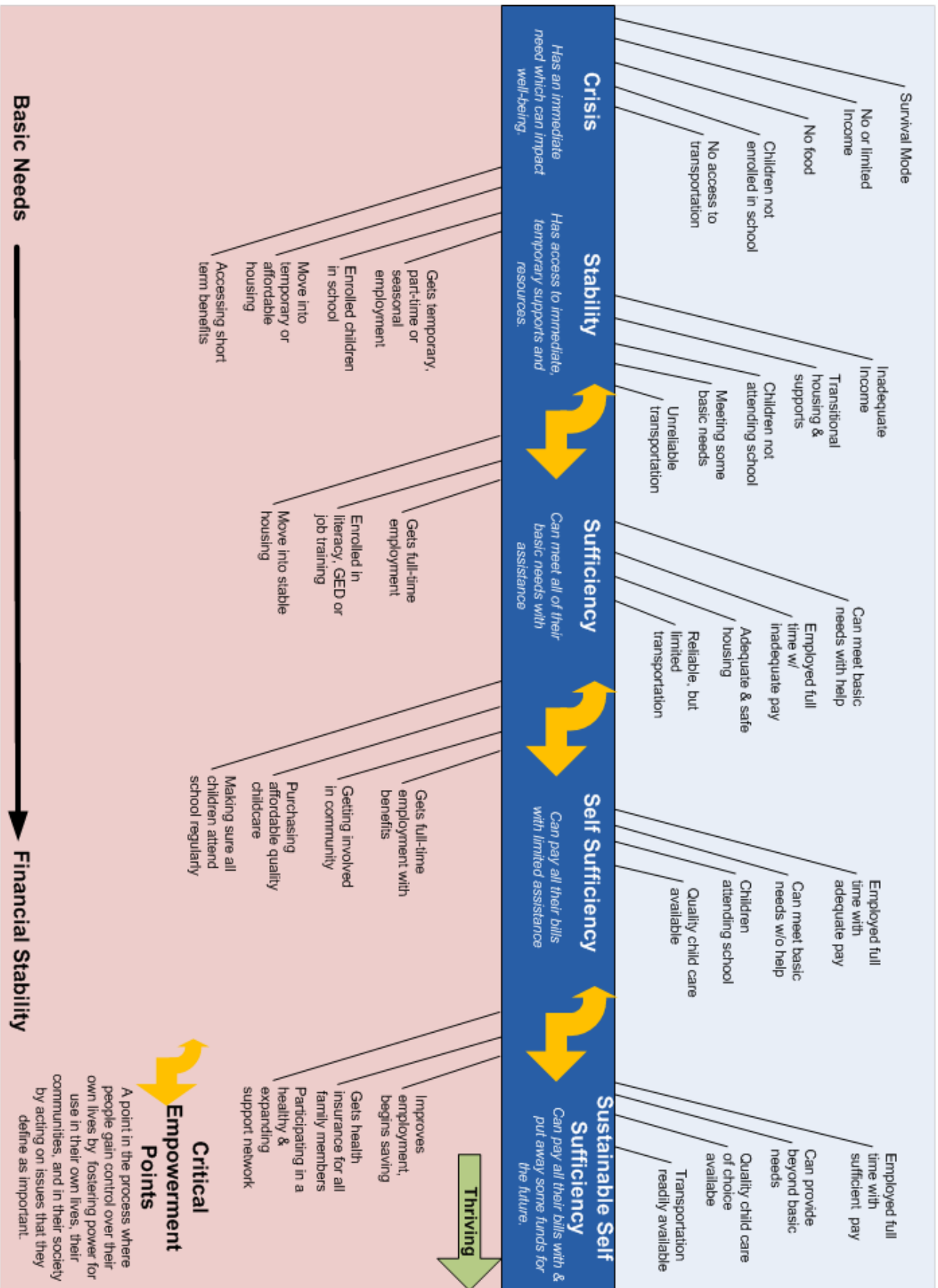
Scale values

- A score of 1 means the client is In Crisis (UWSEM defines this score as "Crisis")
- A score of 2 means the client is Vulnerable (UWSEM defines this score as "Stabilized")
- A score of 3 means the client is Safe (UWSEM defines this score as "Sufficient")
- A score of 4 means the client is Building Capacity (UWSEM defines this score as "Self-Sufficient")
- A score of 5 means the client is Empowered (UWSEM defines this score as "Sustainable Self-Sufficiency")

See diagram on following page

While not every program is required to move an individual or family all the way from crisis to sustainable self-sufficiency, UWSEM will focus in on a program's ability to show the movement of an individual or family along the continuum. This may be a small change in the aggregate Self-Sufficiency score (such as an aggregate score of 2 to an aggregate score of 3), or a significant change (an aggregate score of 1 to an aggregate score of 4), for example.

The Roadmap to a Thriving Family: Critical Empowerment Points and Outcomes



Appendix B: **Indicators of Stellar Agencies**

Partners for investment could include a wide range of organizations. What follows are criterion that will guide United Way's decision-making when considering partners.

Leadership and Community Presence

The organization is transparent, accountable and positively viewed in the community.

- A *clear vision* of the social change they want to make and commitment to building and maintaining a viable organization to achieve that vision, as evidenced by:
 - Mission, vision and values
 - Strategic plan
 - Demonstration of a clear connection to the community it serves
 - Licensure, accreditations, awards and/or other independent recognitions of quality
- An *engaged governance body*, as evidenced by:
 - A board that is structured in a way that makes sense for the governance needs of the organization
 - Documentation that demonstrates an involved and engaged board
 - Recruitment practices that result in a diverse group of members with skills and expertise important to the organization
 - Members who contribute resources and knowledge, with a goal of 100% board giving
 - Working relationships between Senior Management and Volunteer Leadership that show positive, mutual regard and respect
- *Staff leadership capability*, as evidenced by:
 - A CEO and leadership team with the qualifications to run the organization and maintain a good reputation in the community
 - Ability to attract, develop and retain qualified staff
 - Demonstration of employee giving to the organization

Capacity to Deliver on Outcomes

The organization regularly measures its performance against a clear set of goals.

- Is *innovative, resourceful, and results-oriented* in solving a specific social problem as evidenced by:
 - Engagement in continuous learning to achieve its goals/vision
 - Active participation in creative partnerships, network and/or collaborative activities
 - Maintaining an active awareness of "best in class" practices within its field and/or drawing on best thinking from non-traditional sectors
 - Demonstration of public policy and advocacy activities to promote constituent, organizational and sector interests
- Core strategies advance the UWSEM *Agenda for Change*, as evidenced by:
 - Alignment with established outcomes and criteria within the investment plans under Educational Preparedness, Financial Stability, or Basic Needs
 - Demonstrated success in tracking and reporting impact, which accurately measures organizational performance against stated objectives

Sound Financial Management

The organization is a responsible steward in managing its financial resources.

- Demonstrates compliance with all local, state and federal legal requirements related to financial matters
- Demonstrates an effective and proven revenue development strategy, as evidenced by:
 - Diversified contributed income, as well as earned income (if appropriate) compared to the organization's expenses
 - Revenue goals that are realistic based on the economy and past experience
 - Active involvement of the board in the organization's revenue goals and activities
- Demonstrates *resources are used efficiently*, as evidenced by:

- Board review and approval of an annual budget for the organization
- The CEO and senior management understand the financial aspects of the organization
- The CEO and senior management conduct environmental scans to actively capitalize on financial opportunities and minimize financial risk throughout the fiscal cycle
- Appropriate income streams and a realistic budget that adequately covers core operating costs.
- The organization is stable and viable, as evidenced by:
 - A track record of growth
 - Working capital ratio appropriate for its size
 - Positive net assets

Appendix C

Zip codes corresponding to 12 high school communities

**Some of these zip codes may be shared by neighboring high schools. This list is only a guide for the Network Neighborhoods.*

High School	Zip codes served
Hamtramck High School	48203, 48211, 48212
Pontiac High School	48340, 48341, 48342
Central High School	48202, 48204, 48206, 48208, 48210, 48238
River Rouge High School	48209, 48217, 48218, 48229
Melvindale High School	48101, 48120, 48122, 48146
Lincoln High School	48015, 48089, 48091, 48092
Osborn High School	48205, 48213, 48234
Harper Woods High School	48080, 48224, 48225, 48236
East Detroit High School	48066, 48201
Madison Heights High School	48030, 48067, 48071, 48220
Henry Ford High School	48033, 48075, 48219, 48223, 48235, 48240
Cody High School	48216, 48217, 48227, 48228

Centers for Working Families

Current Centers for Working Families	Address
Focus: Hope	1355 Oakman Boulevard, Detroit 48238
Goodwill Industries of Greater Detroit	7700 Second Avenue, Detroit MI 48202
Lighthouse of Oakland County	46156 Woodward Ave, Pontiac MI 48342
Oakland Livingston Human Service Agency	345 E. Nine Mile Road, Ferndale MI 48220
Operation ABLE – Spectrum Human Services, Inc.	4750 Woodward Ave, Detroit MI 48201
Ser Metro for Jobs in Progress	9301 Michigan Avenue, Detroit 48210
Southwest Solutions	3627 W. Vernor Hwy., Detroit, MI 48216

Future Centers for Working Families	Address
The Guidance Center	13101 Allen Road, Southgate 48195
Arab Community Center for Economic and Social Success (ACCESS)	6451 Schaefer Road, Dearborn MI 48126

Early Learning Communities

Early Learning Communities	Address
Macomb Family Services, Inc.	36975 Utica Road, Clinton Township 48036
Leaps and Bounds	8129 Packard, Warren 48089
Oakland Family Services	114 Orchard Lake Road, Pontiac 48341
Oakland County Child Care Council	550 Hulet Dr., Bloomfield Hills 48302
Starfish Family Services	30000 Hiveley, Inkster 48141
Guidance Center	13101 Allen Road, Southgate 48195
Development Centers	24424 W McNichols, Detroit 48219
Southwest Solutions	1920 25th Street, Detroit, 48216
Wayne Metropolitan Community Action Agency	2121 Biddle, Wyandotte 48192

**Appendix D:
Basic Needs Activities categories**

Housing	Issues related to homelessness, including but not limited to: domestic violence, and supportive short and long-term housing.
Food	Issues related to individuals accessing three meals per day.
Child Protection and Care	Issues including child protection from neglect, abuse and exploitation as well as specifically providing supervisory care while parents are not available.
Health Services	Issues related to substance abuse, mental illness, mental and behavioral health services, access to health services for the uninsured or under insured to reduce the burden of sufficiency.
Supportive Services	Case coordination to provide support services that promote self-sufficiency of families and individuals (e.g. seniors, disabled, other vulnerable populations).
Benefit Access	Services that assist individuals in applying for and understanding benefits that can decrease the burden of sufficiency.
Legal Assistance	Services that assist individuals and families in overcoming legal obstacles that prevent self-sufficiency

This list is intended to provide a framework for programs considering applying for investment in basic needs. It is not an exhaustive list and UWSEM is interested in hearing from potential partners other innovative approaches to improving family self-sufficiency. Please note that UWSEM has separate strategies, criteria and guidelines for investments related to Educational Preparedness and Financial Stability.