

Social Services Common 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. These Common Measures continue to be used for our grant making efforts, including the 2025-2028 Community Impact Grants.

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, 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 summary 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 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 Community Impact Team.

Education

Measure	Definition	Verification Methods	Timing of Measurement
<p>Pre-Kindergarten/Kindergarten Readiness</p>	<p>Number of students that will demonstrate Pre-Kindergarten or Kindergarten readiness by end of program year as measured by a reliable academic assessment at end of program year</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. https://tea.texas.gov/earlychildhoodeducation.aspx</p> <p>Research indicates that full-day, full-year quality Early Childhood Programs contribute 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: https://tea.texas.gov/Academics/Early_Childhood_Education/Educator_Resources/</p> <p>Pre-Kindergarten:</p> <ul style="list-style-type: none"> • BASC-3 BESS • CIRCLE • DIAL-4 • Frog Street Assessment • GOLD 	<ul style="list-style-type: none"> • Pre/Post Assessments • Database • Children’s files 	<ul style="list-style-type: none"> • Measured continuously or periodically either informally (portfolios) or formally (assessments in the Fall & Spring) of the program year. • Pre-Kindergarten <ul style="list-style-type: none"> • In Fall and Spring of program year prior to starting Kindergarten. • Kindergarten <ul style="list-style-type: none"> • In Fall and Spring of program year prior to starting Kindergarten • In Fall after starting Kindergarten.

	<ul style="list-style-type: none"> • ISIP-Early Reading • LAP-3 • Work Sampling System <p>Kindergarten:</p> <ul style="list-style-type: none"> • aimswebPlus • BASC-3 BESS • DESSA-mini • DIAL-4 • DIBELS Next • ISIP Early Reading • LION for Reading • MAP for Primary Grades • Ready, Set, K! • STAR Early Literacy • Tejas LEE • TPRI • TX-KEA • Work Sampling System 		
<p>Children progressing toward developmental milestones</p>	<p>Number of students attending the program who increase their social, emotional, and cognitive developmental trajectory as measured by a reliable developmental assessment at end of program year</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"> • Pre/Post Assessments • Database • Children’s files 	<ul style="list-style-type: none"> • Informal – Developmental Monitoring <ul style="list-style-type: none"> ○ Measured continuously or periodically. • Formal – Developmental Screening <ul style="list-style-type: none"> ○ Measured annually, usually within the first 45 days of the new program year.

	<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 ask to hea 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"> • Observing children during play • Milestones Checklists • Documenting findings in Child records/files e.g., Portfolios • Conversations with Parents <p>The following tools can be used to complete Developmental Screening (American Academy of Pediatrics):</p> <ul style="list-style-type: none"> • Ages & Stages Questionnaires • Battelle Developmental Inventory Screening Tool 2nd ed • Bayley Infant Neuro Developmental Screen • Brigance Screens-II • Child Developmental Inventory • Communication and Symbolic Behavior Scales • Developmental Profile • Early Language Milestone Scale • Early Motor Pattern Profile • Motor Quotient • Checklist for Autism in Toddlers • Modified Checklist for Autism in Toddlers 		
<p>Family Engagement</p>	<p>Number of caregivers who demonstrate growth in caregiving practices as measured by a reliable caregiver assessment by end of program year</p> <p>This is defined by the promising research-based or evidence-based tool utilized by the program.</p>	<ul style="list-style-type: none"> • Attendance Records • Pre/Post Survey • Pre/Post Assessment • Qualitative data reports 	<ul style="list-style-type: none"> • Measured continuously or periodically, including at the end of the program year. • Verified during the reporting period to be counted.

	<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"> • Founded on solid research about parenting concepts, skills, and practices • Promotes activities that have been previously shown to have positive effects on parenting and child outcomes • 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 <p>Promising Research-Based tool is defined as a tool that:</p> <ul style="list-style-type: none"> • Includes everything in the research-based category and • Has at least one quasi-experimental study that influences the desired parenting and child outcomes <p>Evidence-Based tool is defined as a tool that:</p> <ul style="list-style-type: none"> • Includes everything in the research-based and promising research-based categories and • 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 		
Test Score Improvement	Number of students that demonstrate an increase in core subject test scores.	<ul style="list-style-type: none"> • Report Cards • End of Course Grades • STAAR Test 	<ul style="list-style-type: none"> • Measured continuously or periodically (6- or 9-week report cards, final test scores per semester).
Grade Improvement	Number of students that demonstrate an increase in grades.	<ul style="list-style-type: none"> • Report Cards • End of Course Grades 	<ul style="list-style-type: none"> • Measured continuously or periodically (6- or 9-week report cards, final test scores per semester).

Grade-Level Reading	<p>Number of students in the program reading at grade level by program year end</p> <p>For younger students, see tools above under Pre-Kindergarten/Kindergarten Readiness</p>	<ul style="list-style-type: none"> • Pre- & Post-Assessments • STAAR Test 	<ul style="list-style-type: none"> • Measured continuously or periodically, including a final assessment at the 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"> • Pre- & Post-Assessments • End of Course Grades • STAAR Test 	<ul style="list-style-type: none"> • Measured continuously or periodically, including a final assessment at the end of the program period.
School Attendance	<p>Number of students demonstrating improvement in school attendance.</p> <ul style="list-style-type: none"> • Tracked from the start of the reporting period to the end of the reporting period (July 1 – June 30) 	<ul style="list-style-type: none"> • Attendance Records • Enrollment Records 	<ul style="list-style-type: none"> • Initial attendance should be recorded at the beginning of the program period. • Verified during the reporting period to be counted.
Grade-Level Promotion	Number of students promoted to the next grade level on time.	<ul style="list-style-type: none"> • School enrollment records 	<ul style="list-style-type: none"> • Measured at the conclusion of the school year. • Verified during the reporting period to be counted.
Accountability and Leadership (work and study habits, civic engagement)	Number of students demonstrating an increased accountability and/or sense of personal responsibility	<ul style="list-style-type: none"> • Pre- & Post-Assessments • Surveys • End of Course Grades • STAAR Test 	<ul style="list-style-type: none"> • Measured continuously or periodically.
Peer & Adult Interactions	Number of students enrolled in quality mentoring or high quality before or after school programming	<ul style="list-style-type: none"> • Enrollment Records • Pre- & Post-Assessments • Surveys 	<ul style="list-style-type: none"> • Measured continuously or periodically.

Teacher & Staff Professional Development	Number of teachers and/or program staff reporting an increase in certification completion, continuing education credits, and professional development opportunities.	<ul style="list-style-type: none"> • Pre- & Post-Assessments • Certification and Credential Documents • Professional Development Attendance Reports 	<ul style="list-style-type: none"> • Measured continuously or periodically.
High School Graduation	<p>Number of high school seniors graduating on time.</p> <ul style="list-style-type: none"> • Measured by # of Freshman in a set cohort who graduate in four years. <p><i>This indicator examines the percentage of public high school students who graduate on time, as measured by the adjusted cohort graduation rate (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).</i></p>	<ul style="list-style-type: none"> • Attendance Records • Enrollment Records 	<ul style="list-style-type: none"> • Measured at the conclusion of the school year for graduating seniors. • Verified during the reporting period to be counted.
College/ Postsecondary Options	Number of students demonstrating an increased knowledge of college and/or other postsecondary choices.	<ul style="list-style-type: none"> • Surveys • College Application Completions • FAFSA Completion 	<ul style="list-style-type: none"> • Measured continuously or periodically.
College, Career, Military Ready	<p>Number of students demonstrating an increase in college and career readiness skills.</p> <p>Defined by 2020-2021 TEA standards: Graduates demonstrate college, career, or military readiness in any one of the following ways: <u>College Readiness</u></p>	<ul style="list-style-type: none"> • SAT Scores • ACT Scores • TSIA • AP/IB Exams • Dual-Course Credits • Internship completion • Employment Records 	<ul style="list-style-type: none"> • Measured at the conclusion of the school year for graduating seniors. • Mid-Year measurement can occur as students complete testing: March, May, June, August, October,

	<ul style="list-style-type: none"> • Meet TSI criteria on the TSI assessment, SAT, ACT, or complete and earn credit for a college prep course in ELA/reading and mathematics • Earn 3 hours of dual-course credits in ELA/Mathematics or 9 hours in any subject • Meet AP/IB examination criteria (score of 3 or more for AP and 4 or more for IB) • Complete OnRamps dual enrollment course and qualify for at least 3 hours of college credit in any subject area <p><u>Career/Military Readiness</u></p> <ul style="list-style-type: none"> • Earn an industry-based certification • Graduate with completed IEP and workforce readiness • Graduate under an advanced diploma plan and identify as a current special education student • Graduate with Level I or Level II Certificate in any workforce education area • Enlist in the U.S. Armed Forces (Army, Navy, Air Force, Coast Guard, or Marines) 		<p>November, and December.</p> <ul style="list-style-type: none"> • Measured continuously or periodically.
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Income

Measure	Definition	Verification Methods	Timing of Measurement
Individuals receiving emergency	Number of INDIVIDUALS who received emergency shelter services	<ul style="list-style-type: none"> • Intake assessments • Client logs 	<ul style="list-style-type: none"> • Measured at time of service

<p>housing services</p>	<p><i>Services is defined as 1 bed night of stay.</i></p> <p><i>This number can be duplicated if an individual leaves the agency's emergency shelter, transitions to another location, and then transitions back to 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 unhoused 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>	<ul style="list-style-type: none"> • Case management logs • HMIS • Receipts from hotel/motel 	
<p>Individuals receiving transitional housing services</p>	<p>Number of INDIVIDUALS who received transitional housing services</p> <p><i>A type of supportive housing used to facilitate the movement of unhoused individuals and families to permanent housing. Generally, unhoused 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</i></p>	<ul style="list-style-type: none"> • Intake assessments • Client logs • Case management logs • HMIS • Receipts from hotel/motel 	<ul style="list-style-type: none"> • Measured at time of service

	<i>structures, at one site or in multiple structures at scattered sites.</i>		
Individuals receiving prepared meals	Number of INDIVIDUALS who received prepared meals <i>Include Meals on Wheels, emergency meals for Meals on Wheels clients, meals at disaster relief sites</i>	<ul style="list-style-type: none"> • Database • Files 	<ul style="list-style-type: none"> • Measured at time of service
Individuals receiving food pantry services	Number of INDIVIDUALS who received food pantry services Include all members of the family	<ul style="list-style-type: none"> • Database • Files 	<ul style="list-style-type: none"> • Measured at time of service
Pounds of food distributed	Total pounds of food distributed as defined by North Texas Food Bank's or by federal or state guidelines	<ul style="list-style-type: none"> • Database • Files 	<ul style="list-style-type: none"> • Measured at time of service
Individuals receiving utility assistance	Number of individuals who received utility assistance who remained connected to utilities for at least 3 months after	<ul style="list-style-type: none"> • Database • Files 	<ul style="list-style-type: none"> • Measured at time of service
Wraparound Resources	Number of Individuals who received wraparound resources, including rent/mortgage assistance, utility, transportation, and childcare assistance	<ul style="list-style-type: none"> • Database • Files 	<ul style="list-style-type: none"> • Measured at time of service
Post-Secondary Enrollment	Number of students that enroll in post-secondary education. Post-secondary education options can include: <ul style="list-style-type: none"> • <i>4-Year College & Universities</i> • <i>2-Year Colleges</i> • <i>Vocational-Technical Schools and Programs</i> • <i>Adult Education and Continuing Education Programs</i> 	<ul style="list-style-type: none"> • Enrollment Records 	<ul style="list-style-type: none"> • Measured at the time of post-secondary enrollment. • Verified during the reporting period to be counted.

Post-Secondary Persistence	Number of students that demonstrate post-secondary persistence	<ul style="list-style-type: none"> • Enrollment Records • Pre- & Post-Assessments • Surveys 	Measured continuously or periodically.
Employment Services	<p>Number of unduplicated individuals who participated 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></p> <ul style="list-style-type: none"> • <i>Basic Job readiness training (soft skills)</i> • <i>1:1 pre- and post-employment counseling</i> • <i>Resume development</i> • <i>Job interview training</i> • <i>Job search assistance</i> • <i>Career exploration and navigation services</i> • <i>Job application assistance</i> • <i>Targeted job referrals</i> • <i>Job retention support</i> 	<ul style="list-style-type: none"> • Intake assessments • Classroom attendance rosters • Case management logs 	<ul style="list-style-type: none"> • Measured continuously • Employment services must be verified as taking place during the reporting period to be counted.
Employment	<p>Number of individuals who participated in employment services who SECURED EMPLOYMENT.</p> <p>Special Case: Two Jobs: <i>If a client secures more than one job during the reporting period, count both jobs in the appropriate EMPLOYMENT areas.</i></p> <p>Special Case: Small Businesses: Programs that provide small business assistance</p>	<ul style="list-style-type: none"> • Client self-report • Employer self-report • Pay stub • Texas Workforce Commission database 	<ul style="list-style-type: none"> • Measured continuously • Employment must be verified during the reporting period to be counted.

	<p>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>		
ESL Completion	<p>Number of unduplicated 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> <p>Literacy levels are defined by the National Reporting System for the following assessments:</p> <ul style="list-style-type: none"> • Test of Adult Basic Education Complete Language Assessment System - English (TABE CLAS-E) • Comprehensive Adult Student Assessment System (CASAS) • Basic English Skills Test (BEST) 	<ul style="list-style-type: none"> • Internal proficiency assessments • Standardized assessments such as the TABE CLAS-E, CASAS, or BEST • Classroom attendance rosters • Case management logs 	<ul style="list-style-type: none"> • Measured at the conclusion of each ESL term • Improvement or completion must be verified during the reporting period to be counted.
Adult Basic Education Completion	<p>Number of unduplicated individuals who accessed ADULT BASIC EDUCATION SERVICES who improved by at least one level in the areas of either writing,</p>	<ul style="list-style-type: none"> • Internal proficiency assessments • Standardized assessments such as the TABE, CASAS, Wonderlic GAIN, WRAT • Classroom attendance rosters 	<ul style="list-style-type: none"> • Measured at the conclusion of each Adult Basic Education term

	<p>reading, or math during the reporting period.</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 Basic Education should be supervised by program staff or trained volunteers.</i></p> <p>Literacy levels are defined by the National Reporting System for the following assessments:</p> <ul style="list-style-type: none"> • Test of Adult Basic Education (TABE) • Comprehensive Adults Student Assessment System (CASAS) • Wonderlic General Assessment of Instructional Needs (Wonderlic GAIN) • The Wide Range Achievement Test (WRAT) 		<ul style="list-style-type: none"> • Improvement or completion must be verified during the reporting period to be counted.
<p>Vocational Training Completion</p>	<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"> • <i>Construction skills</i> • <i>Information technology / A+ Certification</i> • <i>Healthcare occupations</i> • <i>Manufacturing occupations</i> • <i>Forklift operation</i> 	<ul style="list-style-type: none"> • Classroom attendance rosters • Case management logs 	<ul style="list-style-type: none"> • Measured continuously • Vocational training participation must be verified during the reporting period to be counted.

	<ul style="list-style-type: none"> • <i>Commercial Driver’s License (CDL)</i> • <i>Child Care Skills Training</i> <p>Special Case: Training Support Programs: <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> <p>Special Case: Two Training Programs: <i>If a client accesses two vocational training programs during the reporting period, you can count both in the VOCATIONAL TRAINING SERVICES number.</i></p>		
Credentials or Certifications Earned	Number of industry-recognized credentials or certifications earned	<ul style="list-style-type: none"> • Completion certificate or other verification from education provider 	<ul style="list-style-type: none"> • Measured at the conclusion of each vocational training program • Completion must be verified during the reporting period to be counted.
Financial Education Services	<p>Number of unduplicated 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"> • <i>Classroom setting</i> 	<ul style="list-style-type: none"> • Classroom attendance rosters 	<ul style="list-style-type: none"> • Measured continuously • Financial education access must be verified during the reporting period to be counted.

	<ul style="list-style-type: none"> • <i>One-on-one with a financial educator</i> • <i>On-line via a credible software product</i> <p><i>Financial education should be supervised by program staff or trained volunteers.</i></p> <p><i>A list of recommended curricula can be found at www.unitedwaydallas.org/financial-resources</i></p>		
Financial Coaching Services	<p>Number of unduplicated 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"> • <i>Financial coach</i> • <i>Financial counselor trained in financial coaching techniques.</i> • <i>Case manager trained in financial coaching techniques</i> • <i>Volunteer trained in financial coaching techniques.</i> <p><i>Common financial goals include:</i></p> <ul style="list-style-type: none"> • <i>Increasing income</i> • <i>Building emergency savings</i> • <i>Reducing debt</i> • <i>Improving credit</i> • <i>Saving for retirement or asset purchase</i> 	<ul style="list-style-type: none"> • Case management / financial coaching notes 	<ul style="list-style-type: none"> • Measured continuously • Financial coaching access must be verified during the reporting period to be counted.

<p>Improved Financial Capability</p>	<p>Number of unduplicated 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"> • Example: 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 > 4. 	<ul style="list-style-type: none"> • Programs must use the Financial Capability Scale evaluation tool to measure this outcome. 	<ul style="list-style-type: none"> • Financial Capability Scale verification can coincide with scheduled financial coaching sessions • Financial Capability Scale improvement must be verified
<p>Increased Savings</p>	<p>Number of unduplicated individuals who report increased savings.</p> <p>Defining Increase: 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"> • Example: 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 	<ul style="list-style-type: none"> • Bank account statements • Client self-reports • <i>Note: Positive savings is only expected to be monitored for clients who identify savings as a financial goal.</i> 	<ul style="list-style-type: none"> • The timing of savings balance verification will typically coincide financial coaching sessions • POSITIVE SAVINGS must be verified during the reporting period to be counted in an outcome report.

	<p>though savings has recently declined)</p> <p>Important points on SAVINGS:</p> <ul style="list-style-type: none"> • Savings is defined as money that is deliberately set aside by the client for future use.¹ • 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). • Reduced spending and/or increased wages do NOT count as increased savings if the client does not actually save the increased amount. <p><i>¹ 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.</i></p>		
Improved Credit Score	<p>Number of unduplicated individuals who report an improvement in their credit score.</p> <p>Defining Improvement: 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. ²</p>	<p>Credit Score Sources</p> <ul style="list-style-type: none"> • Credit Karma • Credit Wise • Nerdwallet.com • Discover • TransUnion • Experian • Equifax 	<ul style="list-style-type: none"> • The timing of FICO credit score verification will typically coincide with scheduled financial coaching sessions. • Credit score must be verified during the reporting

	<ul style="list-style-type: none"> • Example: 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. <p>Consistency: 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>Unscored: 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><i>² United Way is proposing this specific definition because we believe that achieving an improved credit score overall is more important than demonstrating increasing during every reporting period</i></p>	<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>	<p>period to be counted in an outcome report.</p>
Credit Score Improvement	Number of clients who improved their credit score	<p>Credit Score Sources</p> <ul style="list-style-type: none"> • Credit Karma • Credit Wise • Nerdwallet.com • Discover • TransUnion 	<ul style="list-style-type: none"> • The timing of FICO credit score verification will typically coincide with scheduled financial coaching sessions.

		<ul style="list-style-type: none"> • Experian • Equifax <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"> • Credit score must be verified during the reporting period to be counted in an outcome report.
Non-Mortgage Debt Reduction	<p>Number of unduplicated individuals who reduce non-mortgage debt.</p> <p>What Counts as Non-Mortgage Debt?</p> <ul style="list-style-type: none"> • Credit card debt • Medical debt • Student loan debt • Backed rent and utility payments • Peer debt (owe money to family or friends) • Payday loan debt <p>Defining Debt Reduction: Non-mortgage debt reduction occurs when an individual's amount of unsecured debt at the most recent verification is lower than the client's amount of non-mortgage debt at initial verification.³</p> <ul style="list-style-type: none"> • Example: 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. 	<ul style="list-style-type: none"> • 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 • Example of a debt management tool in CFPB's Your Money Your Goals Toolkit (p. 169): http://files.consumerfinance.gov/f/201407_cfpb_your-money-your-goals_toolkit_english.pdf • <i>Note: Debt reduction is only expected to be monitored for clients who identify debt reduction as a financial goal.</i> 	<ul style="list-style-type: none"> • The timing of non-mortgage debt reduction verification will typically coincide with scheduled financial coaching sessions. • Non-mortgage debt amount must be verified during the reporting period to be counted in an outcome report.

	<p>³ <i>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.</i></p>		
Reduce Non-Mortgage Debt	<p>Number of clients who reduced their non-mortgage debt by \$499 or more</p>	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • The timing of non-mortgage debt reduction verification will typically coincide with scheduled financial coaching sessions. • Non-mortgage debt amount must be verified during the reporting period to be counted in an outcome report.
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"> • <i>YourTexasBenefits.com</i> 	<ul style="list-style-type: none"> • Case management notes • Benefits screening summary provided through software 	<ul style="list-style-type: none"> • Measured continuously • Benefits screening services must be verified during the reporting period to be counted.

	<ul style="list-style-type: none"> • <i>Community Partner Program</i> • <i>YW Self-Sufficiency Calculator</i> 		
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"> • Supplemental Nutrition Program (SNAP) • Nutrition Program for Women, Infants, and Children (WIC) • Temporary Assistance for Needy Families (TANF) • Supplemental Security Income (SSI) • Social Security Disability Insurance (SSDI) • Children’s Health Insurance Program (CHIP) / Medicaid • Head Start • Utility Assistance • Phone Assistance • School Meals 	<ul style="list-style-type: none"> • Client self-report • Benefit documentation 	<ul style="list-style-type: none"> • Measured continuously during follow-up or financial coaching sessions • Benefits access must be verified during the reporting period to be counted
Free Tax Preparation	<p>Number of individuals who accessed free tax preparation services through your organization.</p>	<ul style="list-style-type: none"> • Intake • Case management logs • TaxWise software (for VITA providers) 	<ul style="list-style-type: none"> • Measured continuously • Free tax preparation service utilization must be verified during the reporting period to be counted.

Unbanked to Banked	Number of UNBANKED individuals who open an FDIC insured account to become BANKED	<ul style="list-style-type: none"> • Case management logs • Documentation 	<ul style="list-style-type: none"> • Measured continuously during follow-up or financial coaching sessions
New Affordable Loan	Number of clients that secured a new, affordable loan	<ul style="list-style-type: none"> • Client self-report • Loan provider documentation 	<ul style="list-style-type: none"> • Measured continuously during follow up or financial coaching sessions

Health

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.</p> <p>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:¹</i></p> <ul style="list-style-type: none"> • Diabetes • Heart Disease • Cancer • HIV/AIDS 	<ul style="list-style-type: none"> • Electronic Health Records System 	<ul style="list-style-type: none"> • Clinical services must be verified as taking place during the reporting period to be counted.
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"> • 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. 	<ul style="list-style-type: none"> • Electronic Health Records System 	<ul style="list-style-type: none"> • Clinical services must be verified as taking place during the reporting period to be counted.
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"> • Flu • Coronavirus • Pneumonia • HPV • Boosters 	<ul style="list-style-type: none"> • Electronic Health Records System 	<ul style="list-style-type: none"> • Clinical services must be verified as taking place during the reporting period to be counted.
Individuals of any age receive a preventive health service or screening	<p>Number of individuals, of any age, who receive a preventive 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"> • Electronic Health Records System 	<ul style="list-style-type: none"> • Clinical service must be verified as taking place during the reporting period to be counted.

service or screening.	<ul style="list-style-type: none"> • Vision • Dental • Cancer • Heart Disease <p><u>Please exclude screenings related to:</u></p> <ul style="list-style-type: none"> • Substance Abuse • Mental Health Issues 		
Individuals enrolled or renewed for health coverage	Number of individuals enrolled or renewed for health coverage as a result of program.	<ul style="list-style-type: none"> • Electronic Health Records System 	<ul style="list-style-type: none"> • Enrollment or renewal must take place during the reporting period to be counted.
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"> • Electronic Health Records System 	<ul style="list-style-type: none"> • Clinical services must be verified as taking place during the reporting period to be counted.
Children who receive an immunization.	<ul style="list-style-type: none"> • Number of children, who are 5 years old or younger, who receive an immunization. • DTaP: Diphtheria, tetanus, and acellular pertussis (whooping cough) • Polio: IPV - inactivated polio vaccine; OPV – oral polio vaccine • HepB: Hepatitis B vaccine • Hib: Haemophilus influenzae type b vaccine • PCV: Pneumococcal conjugate vaccine • MMR: Measles, mumps, and rubella vaccines combined • Varicella: Chickenpox vaccine. • HepA: Hepatitis A vaccine 	<ul style="list-style-type: none"> • Electronic Health Records System 	<ul style="list-style-type: none"> • Clinical services must be verified as taking place during the reporting period to be counted.
Pregnant women who start	Number of pregnant women who start prenatal care in the first trimester.	<ul style="list-style-type: none"> • Electronic Health Records System 	<ul style="list-style-type: none"> • Clinical services must be verified as taking place

prenatal care in the first trimester	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).		during the reporting period to be counted.
Pregnant women who receive standard prenatal care according to schedule	Number of pregnant women who receive prenatal care, based on the standard prenatal care schedule and/or their medical provider's recommendations. Please include women beginning prenatal care at any point in their pregnancy. 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).	<ul style="list-style-type: none"> • Electronic Health Records System 	<ul style="list-style-type: none"> • Clinical services must be verified as taking place during the reporting period to be counted.
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"> • Electronic Health Records System 	<ul style="list-style-type: none"> • Clinical services must be verified as taking place 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"> • Electronic Health Records System 	<ul style="list-style-type: none"> • Clinical services must be verified as taking place during the reporting period to be counted.
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"> • Electronic Health Records System 	<ul style="list-style-type: none"> • Clinical services must be verified as taking place during the reporting period to be counted.

Babies born prior to 37 weeks of pregnancy	Number of babies born prior to 37 weeks of pregnancy.	<ul style="list-style-type: none"> Electronic Health Records System 	<ul style="list-style-type: none"> Clinical services must be verified as taking place during the reporting period to be counted.
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"> Services must be delivered or overseen by a licensed counselor. 	<ul style="list-style-type: none"> Client Management System 	<ul style="list-style-type: none"> Clinical services must be verified as taking place during the reporting period to be counted.
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"> Services must be delivered or overseen by a licensed counselor. 	<ul style="list-style-type: none"> Client management system 	<ul style="list-style-type: none"> Clinical services must be verified as taking place during the reporting period to be counted.
Individuals who receive mental health crisis intervention	<p>Number of individuals who receive mental health crisis intervention.</p> <p>Crisis intervention includes interventions provided in person, by text, phone, email, or other method.</p> <ul style="list-style-type: none"> Services must be delivered or overseen by a licensed counselor. <p>Mental Health crisis can be defined but not limited to:</p> <ul style="list-style-type: none"> Suicide attempt Panic attack related to trauma Evidence of self-harm 	<ul style="list-style-type: none"> Client management system 	<ul style="list-style-type: none"> Clinical services must be verified as taking place during the reporting period to be counted
Individuals who have access to needed prescription drugs used to treat or control a	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.	<ul style="list-style-type: none"> Client management system 	<ul style="list-style-type: none"> Clinical services must be verified as taking place during the reporting period to be counted.

mental health condition			
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"> • Client management system 	<ul style="list-style-type: none"> • Clinical services must be verified as taking place during the reporting period to be counted.
Individuals completing residential substance abuse treatment	Number of individuals completing residential substance abuse treatment.	<ul style="list-style-type: none"> • Client management system 	<ul style="list-style-type: none"> • Clinical services must be verified as taking place during the reporting period to be counted.
Individuals completing outpatient substance abuse treatment	Number of individuals completing outpatient substance abuse treatment.	<ul style="list-style-type: none"> • Client management system 	<ul style="list-style-type: none"> • Clinical services must be verified as taking place during the reporting period to be counted.
Individuals in recovery support services	Number of individuals in recovery support services.	<ul style="list-style-type: none"> • Client management system 	<ul style="list-style-type: none"> • Clinical services must be verified as taking place during the reporting period to be counted.
Individuals who receive family violence services (legal services, safety planning, client advocacy, etc.)	<p>Number of individuals who receive family violence related legal services, client advocacy, safety planning, case investigation service, crisis intervention, or assistance, as a result of the work of the program/agency staff or a result of program.</p> <p>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.</p>	<ul style="list-style-type: none"> • Client management system 	<ul style="list-style-type: none"> • Programming completed during the reporting period.

	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.		
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"> • Client management system 	<ul style="list-style-type: none"> • Programming completed during the reporting period.
Individuals who complete battering intervention and prevention program (BIPP) services/treatment	Number of individuals who complete battering intervention and prevention (BIPP) services/treatment.	<ul style="list-style-type: none"> • Client management system 	<ul style="list-style-type: none"> • Programming completed during the reporting period.
Individuals who complete an evidence-based skill building program related to physical activity, nutrition/healthy eating education, and positive health outcomes	<p>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.</p> <p>This also includes number of individuals reporting a behavior and/or physical health change related to diet or exercise post intervention (i.e. decreased BMI, weight loss, reversed medical diagnosis, etc.)</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"> • Client management system 	<ul style="list-style-type: none"> • Programming completed during the reporting period.
Individuals receiving healthcare	Number of individuals receiving healthcare navigator services.	<ul style="list-style-type: none"> • Client management system 	<ul style="list-style-type: none"> • Programming completed during the reporting period.

navigation services			
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