**INSTRUCTIONS FOR COMPLETING**

**THE FY-2026 PROGRAM OUTCOME EARNINGS PLAN**

**(SCOPE OF WORK)**

**Reference Documents**

To understand and to use the document, the following reference materials are necessary:

• Microsoft Excel Spreadsheet “UPO FY-2026 Program Outcome Earnings Plan”

**Purpose of Program Outcome Earnings Plan or Scope of Work**

The Excel spreadsheet is to be used to plan and document the FY-2026 performance. The purpose of the Program Outcome Earnings Plan is to:

• Align UPO’s service delivery system to meet the reporting requirements dictated by the Federal National Performance Indicators.

• Enhance and/or improve program performance leading to better outcomes for the individuals and families we serve; and

• Establish pay rates for those outcomes and services.

**Planning**

The Excel spreadsheet is to be used to plan and document FY-2026 service delivery. Although there are three National Goals in FY-2026, the Program Outcome Earning Plan will address two in terms of modules. Module 4 *– Individuals and Family Level*; and Module 2 – *CSBG Eligible Entity Expenditures, Capacity, and Resources.*

Module 4 - Individuals and families Level including the following areas:

1. Education and Cognitive Development Services.
2. Health and Social/Behavioral Development Services; and
3. Services Supporting Multiple Domains.

Module 2 – CSBG Eligible Entity Expenditures, Capacity, and Resources

1. Volunteer Hours
2. Partners with Community Action

**HOW TO COMPLETE THE PROGRAM OUTCOME EARNINGS PLAN**

The Excel spreadsheet contains automatic formatting properties (e.g., Reporting Period automatically calculates the Period Plan Year to Date; Earnings are automatically calculated once Unit figures are entered).

**Note: Before working on the Excel spreadsheet ensure that you save the original**

The spreadsheet has 2 Tabs – lower left corner

* + **Summary**
	+ **Detailed Plan**
1. **SUMMARY - TAB**

On the **Summary Tab** at top, enter the Program’s name and in the **Red Box** the Proposed Annual Earnings amount is automatically generated when the Program Outcome Earnings Plan is completed.



Outcome Earnings Summary Table

The table automatically generates the service units and amounts to be earned as the Detailed Plan Tab is completed.

Narrative Summary of Program Plan (Scope of Work)

In the *Narrative Summary* *of the Program Plan* briefly enter information that outlines the specific services as stated in the proposal (e.g., Applied Technology Classes will be provided twice a week once in the morning and once in the afternoon)

**Note: The summary should include the type and name of program, activities, and expected outcomes.**

**Note: For Module 2 activities mention your partnerships and describe how your projects or initiatives will have an impact on the community.**

1. **DETAILED PLAN - TAB**

***Program Outcome Earnings Plan***

For each Federal National Performance Indicators (FNPI) there is a list of services (SRV) followed by a dollar amount representing the rate **UPO** has assigned for the measure. **For example:** Under SRV 2x; Completes enrollment requirements (Unduplicated clients), you will see a rate of $20. If you plan 30 enrollments to be completed, then enter 30 in Annual Plan. See the visual below:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **FNPI/ SRV** | **No.** | **MODULE 4: INDIVIDUAL AND FAMILY LEVEL** | **FY-26 Rate**  | **Annual Plan Units**  | **Annual Plan Earned**  |
| **FNPI 2** | **EDUCATION AND COGNITIVE DEVELOPMENT SERVICES** |  |  |  |
| **SRV 2** | 2r-z | **Adult Education Programs** |  |  |  |
|   | 2g | Literacy/English Language Education (ESL) |  |  |  |
|   |   | Class Attendance | **$10** |   | $0  |
| **SRV 2** | 2x | Applied Technology Classes |  |  |  |
|   |   | Completes Enrollment Requirements (Unduplicated clients) | **$20** |   | $0  |
|   |   | Class Attendance | **$10** |   | $0  |

**FNPI 2. EDUCATION AND COGNITIVE DEVELOPMENT SERVICES**

**Adult Education Program**

This pertains to educational programs operated by the service provider or those under “Purchase of Service” agreements.

**Note: Programs must be fully described in the Specific Services section of the Request for Proposal and summarized in the Summary Tab.**

Applied Technology Classes and any other classes indicated pertain to workshop and classes provided by the service providers who introduce and/or improve customers’ computer skills, software applications, internet proficiency and social media knowledge.

**Note: Applied Technology Classes are not Vocational Skills Training Program. Attending these classes and others do not lead to nationally recognized certificates. Customers can earn statements of proficiency. Basically, Applied Technology Classes are to improve customers’ knowledge or familiarity of technological advances in computers, software, cell phones, tablets, etc.**

Completes Enrollment Requirements pay point is for service provider who operate educational programs or those under “Purchase of Service” agreements only.

Class Attendance pay points are for number of class days the seniors/students attend.

**Note: Applied Technology classes’ attendance as well as all other class attendance must be posted in *EmpowOR*.**

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| --- | --- | --- | --- | --- | --- |
| **FNPI/ SRV** | **No.** | **MODULE 4: INDIVIDUAL AND FAMILY LEVEL** | **FY-26 Rate**  | **Annual Plan Units**  | **Annual Plan Earned**  |
| **FNPI 2** | **EDUCATION AND COGNITIVE DEVELOPMENT SERVICES** |  |  |  |
| **SRV 2** | 2r-z | **Adult Education Programs** |  |  |  |
|   | 2g | Literacy/English Language Education (ESL) |  |  |  |
|   |   | Class Attendance | **$10** |   | $0  |
| **SRV 2** | 2x | Applied Technology Classes |  |  |  |
|   |   | Completes Enrollment Requirements (Unduplicated clients) | **$20** |   | $0  |
|   |   | Class Attendance | **$10** |   | $0  |

**FNPI 5. HEALTH AND SOCIAL/BEHAVIORAL DEVELOPMENT SERVICES**

**Mental/Behavioral Health**

Mental Health Counseling and Medication Monitoring and Management must be conducted by certified professional health provider either on staff or those under “Purchase of Service” agreements.

**Note: Individual and group comprehensive counseling must be conducted by a District of Columbia licensed/certified health provider. Case notes may be entered in empowOR.**

Incentives pertain gift cards, food coupons or other rewards give to customers for participating in program or responding to a program request.

**FNPI 7. SERVICES SUPPORTING MULTIPLE DOMAINS**

**Eligibility Determinations**

 Economic Security Assessment pay point is for completing an *EmpowOR* Intake and an Economic Security Scale for every adult customer served. The Economic Security Scale is a measure of customer’s economic status and their movement towards stable lives and economic security.

**Note: Annual Plan figure for the Economic Security Assessment must be equal to the number of unduplicated customers to be served as specified in the Request for Proposal.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **SRV 7** | **SERVICES SUPPORTING MULTIPLE DOMAINS** |  |  |  |
|   | 7b | Eligibility Determinations |  |  |  |
|   |   | Economic Security Assessment (Unduplicated Customers) | **$25** |   | $0  |

**Case Management**

Case Management (Crisis Intervention) means a comprehensive plan must be developed for each customer receiving case management. Interviews, assessments, acceptance must be completed, service plan developed, posted in *EmpowOR,* and updated with case notes monthly. The Initial Service Plan must be posted with at least three (3) goals defined and at least three objectives that are observable, measurable, realistic, and enumerated that state sequential activities to demonstrate movement towards achieving the specific goal(s).

**MODULE 4. INDIVIDUAL AND FAMILY LEVEL TOTAL**

Module 4, Individual and Family Level Total summarizes the subtotals of Employment, Employment Services, Education and Cognitive Development Services, Income and Asset Building, Housing Services, Health and Social/Behavioral Development Services and Services Supporting Multiple Domains units of services and planned earnings.



**MODULE 2: CSBG ELIGIBLE ENTITY EXPENDITURES, CAPACITY AND RESOURCES**

**B 3. Volunteer Hours**

Volunteers to Community Action pay point count one volunteer per month. Estimate the total number of volunteers per month for the year. Enter the total estimated number of volunteer hours for the year. These hours must be entered into Program Outcome Earning Report (POER) monthly.

 **Note: The number of Volunteer Hours must be entered if Volunteers are entered.**

Low-income Volunteers to Community Action pay point counts one volunteer per month. Low-income volunteers must meet 200% of the CSBG Poverty Guidelines. Estimate the total number of volunteers per month for the year. Enter the total estimated number of volunteer hours for the year. These hours must be entered into POER monthly.

**Note: The number of Low-income Volunteer Hours must be entered if Low- income Volunteers are entered.**

 **B 5. Partners with Community Action**

 Partners with Community Action are cumulative and counted once (unduplicated). Estimate the total number of organizational partnerships to be established that will support the planned services (i.e., government, for-profit businesses, non-profit organizations, educational institutions, and faith-based organization) for the entire year. New partners must be reported monthly.

**Note: As a minimum, the planned number of Partners must coincide with the number of Partners specified on Attachment C: *Coordination and Linkages* in Request for Proposal.**

**Note: In the Request for Proposal and briefly on Summary Tab describe the impact such cooperation will have in the community.**

**MODULE 2: CSBG ELIGIBLE ENTITY EXPENDITURES, CAPACITY & RESOURCES TOTAL**

Module 2: CSBG Eligible Entity Expenditures, Capacity & Resources summarizes Volunteer Hours and Partners with Community Action service units.



**AGENCY TOTAL**

The AGENCY TOTAL is the summation of Module 4 *– Individuals and Family Level*; and Module 2 – *CSBG Eligible Entity Expenditures, Capacity, and Resources* totals. The AGENCY TOTAL will appear on the Summary Tab. The Annual Plan earnings would be the Proposed Annual Earnings.

**Note: The Proposed Annual Earning (Annual Plan) must be equal to the amount specified in the Request for Proposal.**

