

INSTRUCTIONS FOR COMPLETING THE FY-2027 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-2027 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-2027 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-2027 service delivery. Although there are three National Goals, in FY-2027, the Program Outcome Earning Plan (POEP) will address two in terms of modules. Module 4 – *Individuals and Families Level*; and Module 2 – *CSBG Eligible Entity Expenditures, Capacity, and Resources*.

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

- a) Employment.
- b) Employment Services.
- c) Income and Asset Building.
- d) Housing Services.
- e) Health and Social/Behavioral Development Services; and
- f) Services Supporting Multiple Domains.

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

- a) Volunteer Hours
- b) Partners with Community Action

HOW TO COMPLETE THE PROGRAM OUTCOME EARNINGS PLAN

The Excel spreadsheet contains automatic formatting properties (e.g., Earnings are automatically calculated once Unit figures are entered).

Note: **Before working on the Excel spreadsheet ensure that you save the original. Do not make any changes to the amounts indicated for each pay point or formulas.**

The spreadsheet has 2 Tabs – lower left corner.

- **Summary**
- **Detailed Plan**

A. SUMMARY - TAB

On the **Summary Tab**, enter the Program’s name. The amount in the **Red Box**; the Proposed Annual Earnings, is automatically generated when the Program Outcome Earnings Plan is completed in the **Detailed Plan** tab.

OUTCOME EARNINGS SUMMARY			
MODULES TOTALS		Annual Plan Units	Annual Plan Earnings
Mod 4:	INDIVIDUAL & FAMILY LEVEL TOTAL	0	0
Mod 2:	CSBG ELIBIBLE ENTY EXPENDITURES, CAPACITY & RESOURCES TOTAL	0	0
AGENCY TOTAL		0	0

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., Vocational Skills Training Programs include 3 days in-house CPR training & 3-day Food Handler Certification.)

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.

B. 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 FNPI 1b. Obtains Full-Time Job, you will see a rate of \$1250. If you plan 30 Full-Time Job Placements, then enter 30 in Column (8) Annual Plan. Then indicate a unit you plan to achieve for each month broken down from October through September using program knowledge and information.

1. MODULE 1: INDIVIDUAL AND FAMILIES LEVEL

FNPI 1. Employment

Obtains Full-Time Job and Obtains Part-Time Job pay points pertain to customers placed in a full-time job (30 hours or more a week) and part-time job (less than 30 hours a week). If an individual holds both a full-time and part-time job at the same time payment can be earned for both jobs with proper documentation.

Note: For every job placement a copy of the employer's written verification and/or pay stubs must be submitted in *EmpowOR* to verify the job placement. Also, Job Placement information must be recorded. Customers in case management must have case notes indicating job placements entered in *EmpowOR*. Job placements are legitimate positions in which the customers' lives become stable and lead to economic security.

Note: Each service provider must account for at least sixty (60) job placements. They must be equal to the number of customers placed in jobs specified in the Request for Proposal.

Obtained and maintained employment for at least 30 days' pay points Full-Time and Part-Time pertain to customers who hold their job for the stated amount of time.

Note: Every employment retention milestone achieved requires copies of employer's written verification and/or pay stubs posted in *EmpowOR*. Customers in case management must have case notes indicating 30-day retention entered in *EmpowOR*.

Obtained and maintained employment for at least 90 days' pay points Full-Time and Part-Time pertain to customers who maintain employment for the stated amount of time.

Note: Every employment retention milestone achieved requires copies of employer's written verification and/or pay stubs posted in *EmpowOR*. Customers in case management must have case notes indicating 90-day retention entered in *EmpowOR*.

Note: Employment retention means that the customer-maintained employment with no more than a 30-day break between jobs.

Obtained and maintained employment for at least 180 days' pay points Full-Time and Part-Time pertain to customers who maintain employment for the stated amount of time.

Note: Every employment retention milestone achieved requires copies of employer's written verification and/or pay stubs posted in *EmpowOR*. Customers in case management must have case notes indicating 180-day retention entered in *EmpowOR*.

Note: Employment retention means that the customer-maintained employment with no more than a 30-day break between jobs.

Obtained and maintained employment for at least 270 days' pay points Full-Time and Part-Time pertain to customers who hold their job for the stated amount of time.

Note: Every employment retention milestone achieved requires copies of employer's written verification and/or pay stubs posted in *EmpowOR*. Customers in case management must have case notes indicating 270-day retention entered in *EmpowOR*.

Note: Employment retention means that the customer-maintained employment with no more than a 30-day break between jobs.

Obtained and maintained employment for at least 365 days' pay points Full-Time and Part-Time pertain to customers who hold their job for the stated amount of time.

- Note:** Every employment retention milestone achieved requires copies of employer's written verification and/or pay stubs posted in *EmpowOR*. Customers in case management must have case notes indicating 365-day retention entered in *EmpowOR*.
- Note:** Employment retention means that the customer-maintained employment with no more than a 30-day break between jobs.
- Note:** All continuous employment must be documented with the new employer, labor information, and to indicate the reasons for change of employment. Customers in case management must have case notes indicating change of employment.

Earned income through self-employment for 30 days or more days pay point pertains to customers who earn income as independent workers for the stated amount of time. (i.e., *Uber* or *Lift* driver, dog walker etc.)

- Note:** This milestone requires copies of customer's written verification, pay stubs and/or employer's IRS Form 1099 posted in *EmpowOR* verifying earned income for the stated amount of time. Customers in case management must have case notes indicating independent earnings in *EmpowOR*.

Obtains Employment with Benefits pay point refers to a customer who has obtained a job that provides benefits (i.e., health insurance, annual leave, etc.). By obtaining a position with benefits, the service provider can earn an additional \$225 per customer.

- Note:** For every job placement with benefits Job Placement information and copies of employer's written verification and/or pay stubs must be posted in *EmpowOR*. Customers in case management must have case notes indicating job placements with benefits entered in *EmpowOR*.
- Note:** For customers who obtain benefits after their initial job placement, copies of employer's written verification and/or pay stubs must be posted in *EmpowOR* to verify the benefits. Benefits include paid time off, health insurance, retirement, etc.

SRV 1. Employment Services

Skills Training & Opportunities for Experience

Vocational Skills Training – Lists several training programs that can be offered. Each program requires enrollment, attendance, and completion outcome. If not listed an additional vocational training program can be entered.

Enrollment pay point is for service providers who operate the training program or those under "Purchase of Service" agreements only.

- Note:** The training program must be fully described in the Specific Services section of Request for Proposal and summarized in the Summary Tab.
- Note:** The enrollment must be entered in *EmpowOR*.
- Note:** Vocational Skills Training does not include job readiness classes.
- Note:** The curriculum for service providers who operate the training program with 31+ class days and those under "Purchase of Service" Agreements must be included in the Request for Proposal.

Note: Customers in case management must have case notes indicating enrollment in a training program, type of training, length of class, etc. entered in *EmpowOR*.

Class Attendance pay point is used both for skill training programs that have 1 to 30 class days, as well as those with 31 or more class days.

Note: Class attendance must be entered in *EmpowOR*. These figures are the summation of class days that all customers enrolled would have acquired during the full training period. (e.g., Number of planned enrollments x Number of days per class = Planned Class Attendance)

There are two different Completed Training with National Certification or License pay points. One is for skill training programs that have 1 to 30 class days, and one is for those that have 31 or more class days.

Note: For customers who complete the skill program they must have documentation in *EmpowOR* verifying completion. Customers in case management must have case notes indicating that the training program was completed.

EXAMPLE

If you plan to have 30 customers enrolled in your three-day CPR training and have 25 of them become certified, you will enter 30 in Column (8) under Completes Enrollment Requirements, multiply 30 by the number of class days, 3, that will total 90 Attendance units. Enter 90 in Column (8). Enter 25 in Column (8) under Completes training with national certification or license, 1 to 30 class days.

Job Search – This pays point pertains to job readiness activities conducted in individual sessions or in a group setting. The activities include but are not limited to job readiness counseling, resume development, job search & interview skills training, job referrals, pre-employment physicals, background checks, urinalysis, etc.

Note: For customers who participate in these job readiness activities must have them posted in *EmpowOR* under Employment Services.

Demonstrates Job Readiness Skills means that the customer is “job ready” by completing job readiness counseling and preparation activities, referred to a job, and has gone out on at least one (1) job interview.

Note: Customers who demonstrate job readiness must have job readiness activities posted in *EmpowOR* including at least one job referral.

Note: The number of unduplicated customers demonstrating job readiness cannot exceed the number of economic assessments conducted.

Note: Copies of job referrals must be posted in *EmpowOR* to verify referrals. Customers in case management must have case notes indicating job referrals entered in *EmpowOR*.

For **EMPLOYMENT SERVICES** the spreadsheet automatically multiplies planned unit by its corresponding rate indicated on the POEP.

FNPI 2. EDUCATION AND COGNITIVE DEVELOPMENT SERVICES

Applied Technology Classes pertain to workshops and classes provided by 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 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 students attend.

Note: Applied Technology classes' attendance must be posted in *EmpowOR*

NPI 3. INFRASTRUCTURE AND ASSET BUILDING

Training and Counseling Services

Financial Capacity Skills Training pertains to classes and workshops operated by service provider or those under "Purchase of Service" agreements. Classes would include financial literacy education/consumer education. Outcomes include customers who open and maintain a saving account/IDA and/or checking account.

Note: Completion of a Financial Capacity Skills Training is pre-requisite for opens and maintains a savings account and/or opens and maintains a checking account.

Note: The service provider must have evidence that the customer improved financial wellbeing. Evidence must be posted in *EmpowOR*.

Financial Management Programs pertains to programs operated by service providers or those under "Purchase of Service" agreements. The program would include budget counseling, establishment and maintenance of a budget, credit management, credit repair and/credit counseling.

Note: The service provider must have evidence that the customer set up and maintained a budget, improved credit scores, received budget counseling and completed a financial literacy program. Evidence must be posted in *EmpowOR*.

Note: The service provider must have evidence that the customer improved financial wellbeing. Evidence must be posted in *EmpowOR*.

Small Business – Setup & Development Counseling Sessions/Classes

Services pertain to entrepreneurship counseling sessions, workshops, and programs operated by service providers or those under "Purchase of Service" agreements.

Note: The service provider must have evidence that the customer attended sessions, set up a business plan, opened business accounts, established federal EIN, obtained a business license etc. to demonstrate the customer set up their own business. Evidence must be posted in *EmpowOR*.

SRV 4. HOUSING SERVICES

Eviction Prevention Services pertains to services to include evicction counseling, landlord/tenant medication, and assistance to apply ERAP or CHAP, etc.

Note: The service provider must have evidence that the customer maintained their residency and post them in *EmpowOR*.

FNPI 5. HEALTH AND SOCIAL/BEHAVIORAL DEVELOPMENT SERVICES

Mental/Behavioral Health

Mental Health Counseling 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.

Incentives pertain to 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

Case Management

Initiates Case Management Plan means a comprehensive plan must be developed for each customer receiving case management. Interviews, assessments, acceptance must be completed, service plan developed and posted in *EmpowOR* prior to initiating a plan. The Service Plan must be posted with at least three (3) problems defined, objectives that are observable, measurable, realistic, and enumerated three (3) steps that state sequential activities to demonstrate movement towards achieving specific objectives.

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.

Transportation Services

Obtains Transportation pay points must have evidence that transportation assistance has been provided (i.e., sign-in sheets, daily distribution logs, etc.) and posted in *EmpowOR*.

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.

2. MODULE 2: CSBG ELIBLE ENTY EXPTENDITURES, 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 Earns 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.

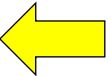
Note: The number of Low-income Volunteer Hours must be entered if Low-income Volunteers are entered.

B 5. Partners with Community Actions

Partners with Community Action are cumulative but are counted once. Estimate the 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). 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 summaries Volunteer Hours and Partners with Community Action service units.

AGENCY TOTAL

The AGENCY TOTAL is the summation of Module 4 Individual and Family Level and Module 2. CSBG Eligible Entity Expenditures, capacity, and Resource 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.

3. Plan Summary

On the Program Outcome Earning Plan cover summarize the activities you are preparing to assist customers to become stable and achieve economic security. Describe your employment, vocational, or educational programs. Mention time frames, referrals, cohort groups, your partnerships and describe how your projects or initiatives will have impact on the community.