



# Income Announcement Meeting

- October 8, 2009



Give. Advocate. Volunteer.

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# Agenda



- Road to Transformation
- Community Impact Overview
- Income Impact Subcommittee
  - Process
  - Plan
- Next Steps
- Questions



# ROAD TO TRANSFORMATION



# Road to Transformation

## Evolution-Resource Investment Strategy



**1967-mid 1990's**

- focus on basic levels of fiscal and programmatic accountability

**mid 1990's-2009**

- focus on direct service outputs & results

**2010** —————>

- focus on root causes & creating community & personal change



# Road to Transformation



## September 2006

- UWMC participated in an online United Way of America (UWA) Self Assessment survey in evaluating how our UW ranked according to the UWA Standards of Excellence
  - The UWA Standards of Excellence:  
Describe the benchmarks for a United Way being considered a Community Impact United Way

# Road to Transformation



## **January 2007**

- UWMC Board formally appointed the Community Impact Ad Hoc Planning Committee

## **March 2008**

- Committee Report presented and accepted by the UWMC Board
- Education, Income and Health Subcommittees approved

## **July 2008**

- Strategic plan presented to the Board to initiate the Community Impact transformation
- Public Policy Subcommittee approved



# Road to Transformation

## **August 2008**

- Community Impact presentation for partner agencies
- One-on-one follow up conducted

## **September 2008**

- Impact Subcommittee recruitment

## **January-October 2009**

- Impact Subcommittee process

## **September 2009**

- Board approved Income Impact Plan

## **October 2009**

- *Board to approve Education & Health Impact Plans*



# COMMUNITY IMPACT OVERVIEW



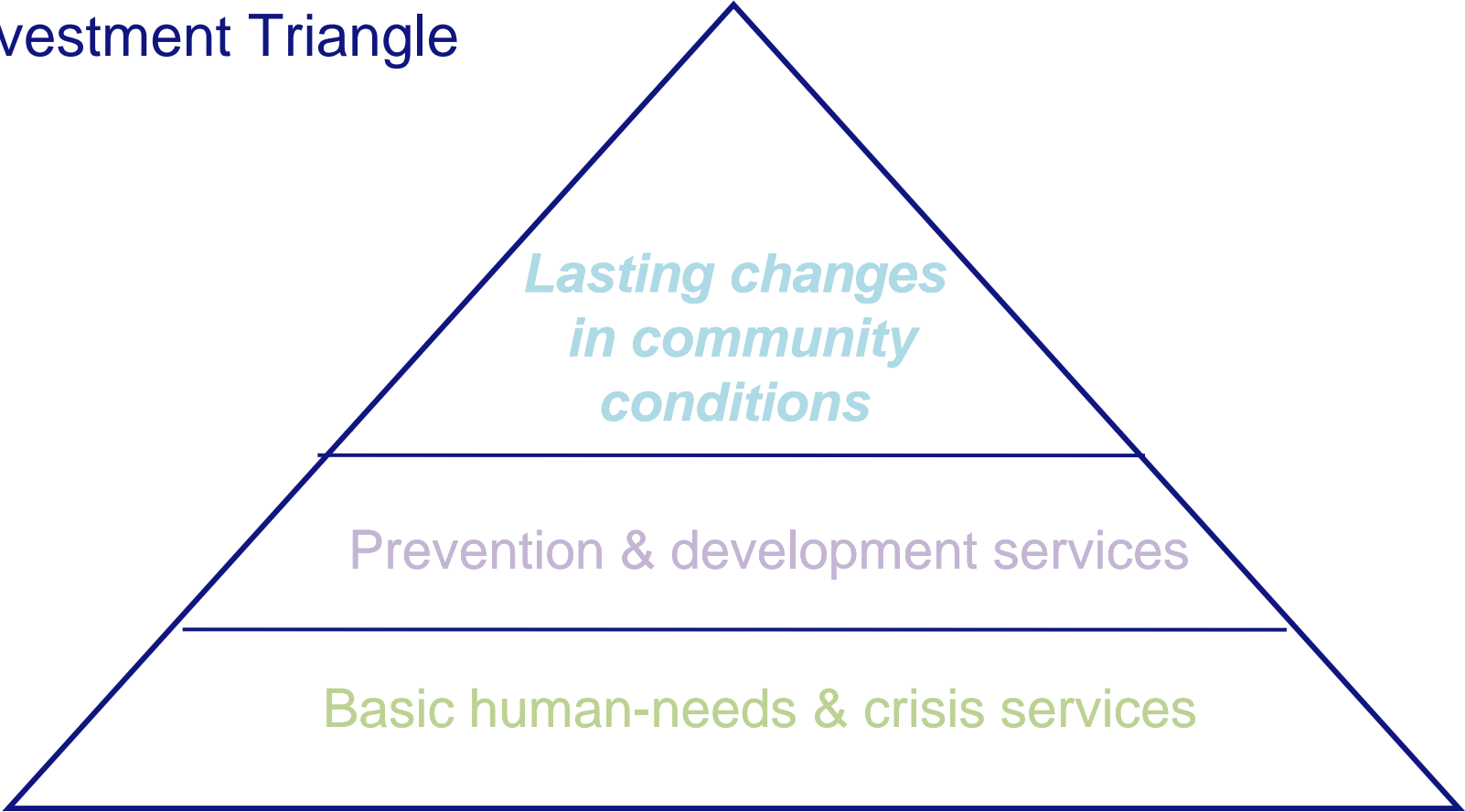
# Community Impact Overview



Improving lives  
by mobilizing communities  
*to create lasting changes  
in community conditions*

# Community Impact Overview

## Investment Triangle



This integrated approach encompasses all components of the Resources Investment process



# Community Impact Overview

## Resources

- Funding
  - Unrestricted, grants, sponsorships
- Volunteerism
  - Volunteer Center
- Advocacy
  - Public policy subcommittee
- Collaboration
  - Impact subcommittees, funding partners
- Public Education & Awareness
  - Impact subcommittees

# Community Impact Overview

## Focus Areas



Creating the opportunities  
for a good life for all by focusing on:



### **EDUCATION**

Helping children  
and youth achieve  
their potential



### **INCOME**

Promoting financial  
stability and  
independence



### **HEALTH**

Improving  
people's health





# INCOME IMPACT SUBCOMMITTEE





# Income Impact Subcommittee

**Chair:** Louis Paparozzi

**Members:**

Russell Anderson, Center for Vocational Rehabilitation

Carl DeJura, Brookdale Community College-Adult Education

Diane Gray, Novadebt

Roger Hart, Community Representative

Eileen Higgins, Workforce Investment Board

Shawna Goldstein, Family Promise

Lynn Miller, Community Representative

Maureen Mulligan, Coastal Habitat for Humanity

Mark Scher, Community Representative

Peter Stahl, Community Enterprises Corporation

# Income Impact Subcommittee

## Vision & Purpose



### **Vision**

To promote financial stability and independence

### **Purpose**

To develop, implement and measure strategic investments of resources that will lead to sustainable, long term change in the focus areas of income.

# Income Impact Subcommittee Process



Step 1-Issue identification

Step 2-Issue selection

Step 3- Objectives

Step 4- Strategies

# Income Impact Subcommittee

## Step 1-Issue identification

- Social & Demographic report produced
- Community Leaders survey conducted
  - Nonprofit agency-67.1%
  - Government agency-12.0%
  - Private/for profit agency -3.2%
  - Corporation-10.8%
  - Individual-8.2%

# Income Impact Subcommittee

## Step 1-Issue identification

- Focus groups:
  - Diversity/Demographics
  - Education
  - Immigration
  - Income**
  - Seniors
  - People with Disabilities
  - Health



# Income Impact Subcommittee

## Step 1-Issue identification

- Monmouth County Department of Human Services, Division of Social Services, 2007-2008 program statistics
- State of New Jersey, Department of Human Services, Division of Family Development, Current Program Statistics, November 2008
- United States Department of Labor, Bureau of Labor Statistics
- 2-1-1 New Jersey, 2008-2009 program statistics
- Income Impact-Basic Needs Survey

# Income Impact Subcommittee



## The Self-Sufficiency Standard

	<b>1 Adult</b>	<b>1 Adult Infant Preschool</b>	<b>2 Adults Preschool Schoolage</b>
Monthly Expenses	\$2,220	\$5,115	\$5,630
Hourly Wage	\$12.61	\$29.06	\$15.99 per adult
Annual Income	\$26,643	\$61,376	\$67,556

- NJ minimum wage-\$7.25/hour (as of 7/24/2009)
- On average 3 times the Federal Poverty Level

# Income Impact Subcommittee



## Lower income working families

	<b>Total Working Families</b>	<b>Lower-income</b>	<b>Percent lower-income</b>
2006	93,331	9,069	9.7%
2007	98,758	10,980	11.1%

## UWMC Basic Needs Survey

- Barrier as having an impact on clients ability to achieve self-sufficiency:
  - 100% - employment/income



# Income Impact Subcommittee



## Community Leaders Survey

	<b>Somewhat serious</b>	<b>Very Serious</b>	<b>Combined</b>
Affordable housing	23.3%	70.8%	94.1%

## Housing Burden on Lower-Income Working Families

	<b>Spend less than 30% on housing</b>		<b>Spend 30% or more on housing</b>		<b>Spend 40% or more on housing</b>		<b>Spend 50% or more on housing</b>	
<b>Total</b>	<b>#</b>	<b>%</b>	<b>#</b>	<b>%</b>	<b>#</b>	<b>%</b>	<b>#</b>	<b>%</b>
<b>9,069</b>	2,145	23.7%	6,924	76.3%	5,329	58.8%	3,526	38.9%





# Income Impact Subcommittee

## Step 2-Issue selection

- Community Impact Issue Ranking Worksheet
  - Community Importance
  - UWMC Involvement

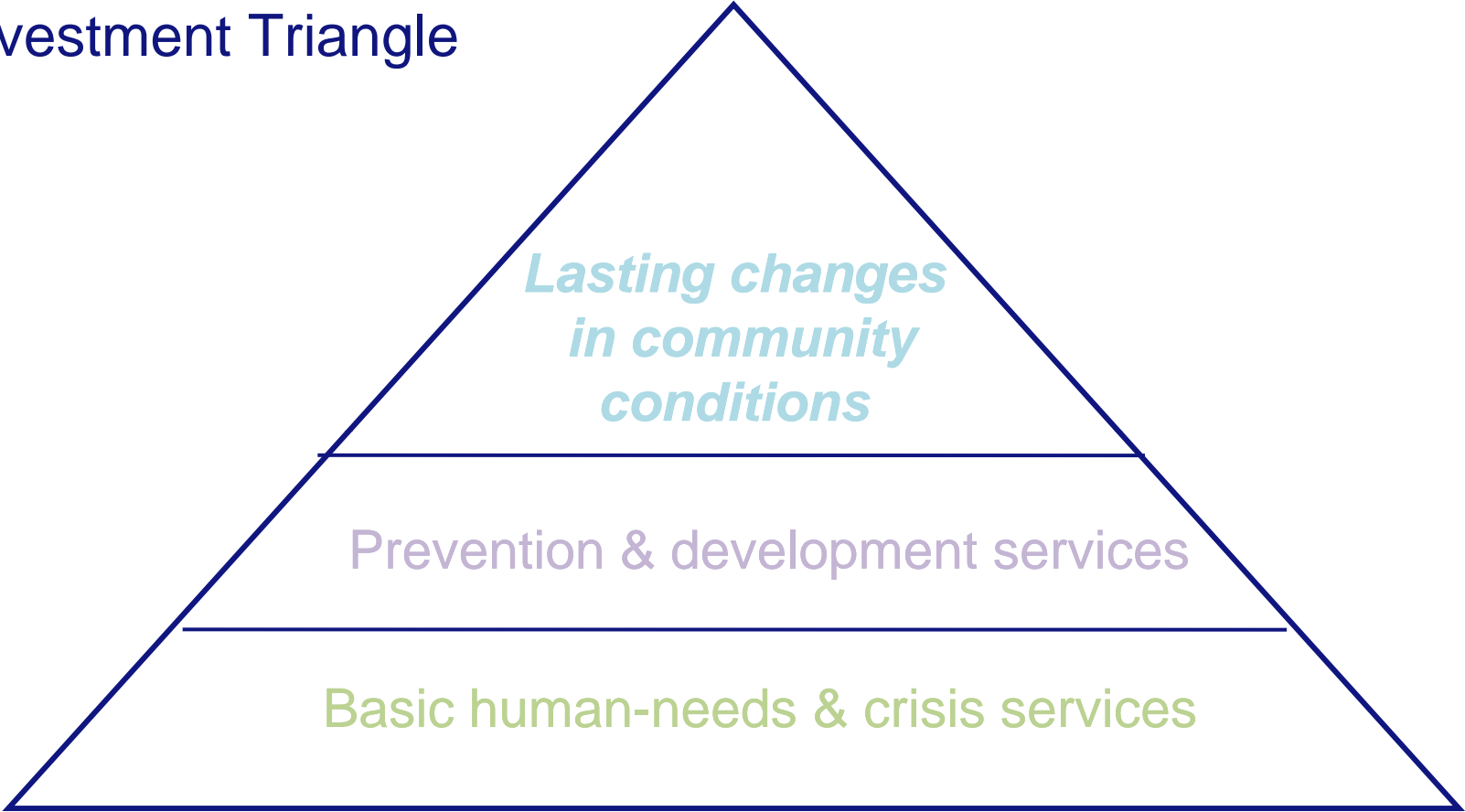
# Income Impact Subcommittee

## Step 2-Issue selection

1. Basic Needs/Emergency Services  
*(Financial Stability)*
2. Gain & Sustain Employment  
*(Financial Security)*
3. Housing for All  
*(Financial Independence)*

# Community Impact Overview

## Investment Triangle



This integrated approach encompasses all components of the Resources Investment process



# Income Impact Subcommittee

## Step 3 & 4-Objectives & Strategies

### 1) Basic Needs/Emergency Services

- a. Connect households in financial crisis with emergency assistance to meet immediate basic needs
- b. Address obstacles/barriers to financial self-sufficiency
- c. Increase access to public benefits to increase a household's income
- d. Increase household's access and ability to build savings, gain and sustain assets and manage future crisis

**Target population (s):** a) households in temporary financial crisis, and b) households in on-going financial crisis

# Income Impact Subcommittee

## Step 3 & 4-Objectives & Strategies

### 2) Gain & Sustain Employment

- a. Assist individuals address & overcome barriers to acquire, maintain and advance in their employment
- b. Increase access to pro bono/volunteer opportunities focusing on skill-based development

**Target Population(s):** a) households seeking employment, b) lower-income working households and c) people with disabilities



# Income Impact Subcommittee

## Step 3 & 4-Objectives & Strategies

### 3) Housing for All

- a. Expand the availability of options for people to acquire & maintain housing appropriate to their income and need

**Target Population:** a) Lower-income working households

# NEXT STEPS





## Next Steps

### Get involved

- Funding
- Volunteerism
- Advocacy
- Collaboration
- Public Education & Awareness

–Contact us at 732-938-5988 or  
e-mail: [thearne@uwmonmouth.org](mailto:thearne@uwmonmouth.org) or  
[cjagerburger@uwmonmouth.org](mailto:cjagerburger@uwmonmouth.org)

# Next Steps

## Funding Implementation Timeline

Community Impact funding cycle for  
Income, Education & Health:

- October 1, 2010 – September 30,
- Focus area 1- 2011
- Focus area 2-2012
- Focus area 3-2013



# Next Steps

## Transition to Multi-Year Funding

All funding amounts for the multi-year grants will be subject to actual availability of funds

	2010	2011	2012	2013
Focus Area 1	Award 3 year grant	Reporting only	Reporting only	Award 3 year grant
Focus Area 2	Award 1 year grant	Award 3 year grant	Reporting only	Reporting only
Focus Area 3	Award 2 year grant	Reporting only	Award 3 year grant	Reporting only



# Next Steps

## Income Impact Funding

Mandatory Income Technical Assistance meeting

**January 28, 2010**

9:30 AM

Conference Rooms C, D, E

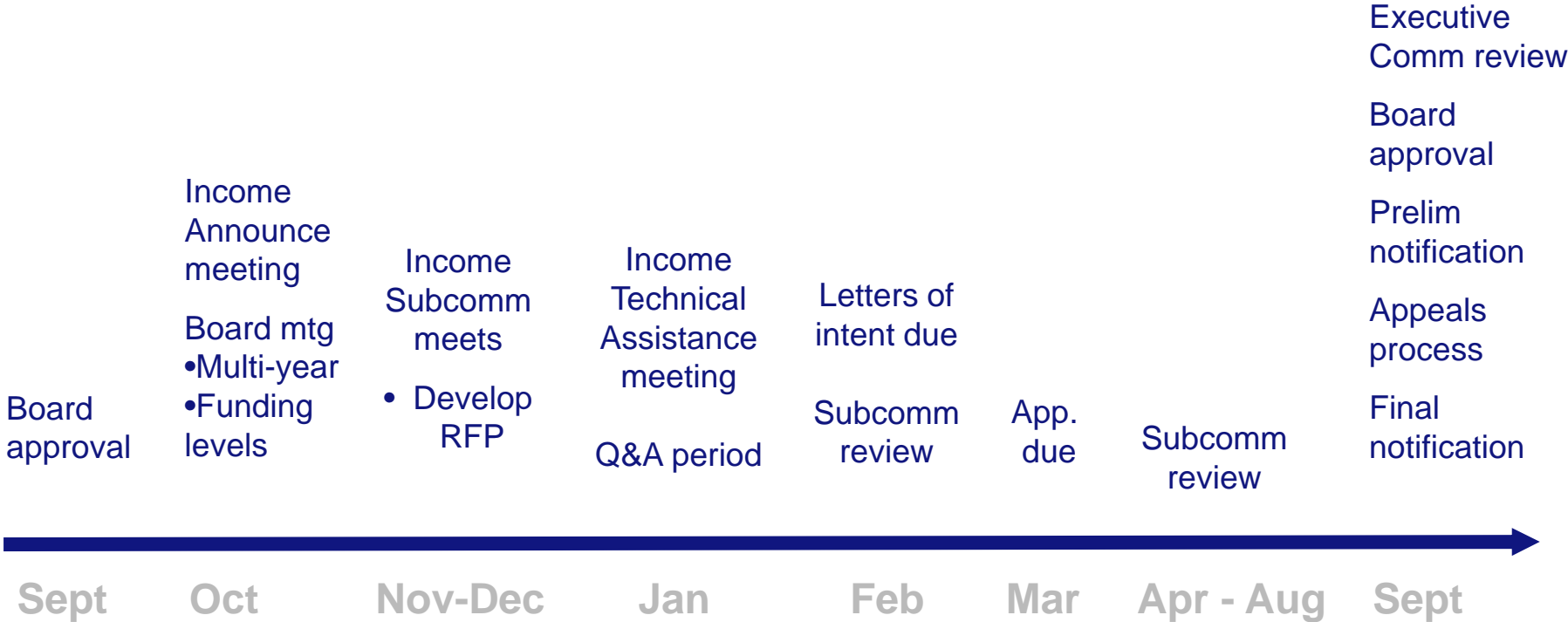
NJNG Building, Wall Township

- Inclement weather date: February 4<sup>th</sup>



# Next Steps

## Income Impact Funding Timeline



# Next Steps

## Impact Funding

- Multiple proposals per agency
- Alignment with objectives & strategies
- Strong emphasis on:
  - Capacity
  - Collaboration
    - Staff will provide training/consultation
    - Lead agency will be UWMC Certified
  - Outcomes & results

# Next Steps



## Announcement meetings

- November 2<sup>nd</sup> – Education
- November 12<sup>th</sup> - Health

–9:00-11:00 AM, Conference Rooms C, D, E

UWMC encourages meetings with agency staff and board members to discuss Community Impact

# QUESTIONS





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