

Implementation Plan Template

INSTITUTION NAME

PREPARED BY

DATE



POWERED BY



UNITED WAY BAY AREA

CORE PRINCIPLES

SparkPoint Centers are the result of unique collaborations of agencies and institutions that are committed to improving financial stability outcomes for members of their communities. SparkPoint is replicating and improving the most innovative and promising national model, developed by the Annie E. Casey Foundation through its Center for Working Families program. The model rests on principles around common goals, best-practice service provision, and a partnership approach. Each SparkPoint Center is being developed organically according to local community needs and assets, but partners at each Center share a commitment to five principles:

1. We operate under the assumption that **families are creative, resourceful, and whole**. We take a holistic client/student-centered coaching approach, meeting individuals where they are and listening to their needs.
2. We provide a **seamless experience for clients** who are able to access multiple, coordinated services in one location. SparkPoint partners and collaborates with various institutional programs and departments as well as other nonprofit and government agencies in the community to provide services that address the multiple needs/challenges that students face.
3. We commit to **engaging with clients long-term**, meeting individuals/families where they are, understanding that individual experiences do not often follow a linear path.
4. We constantly **evaluate our programming and engage in learning** through the use of data and engaging with clients directly to ensure equitable outcomes and continuous improvement.
5. We create a welcoming and respectful environment, **valuing the dignity of all clients no matter their background or identity**, especially Black, Indigenous, Latinx, Asian, and other communities of color that have been historically marginalized by white supremacist institutions.

CENTER SUMMARY

Summary paragraph of center:

COMMITTEE MEMBERS

PLANNING LEAD

Name	Agency	Title/Role	Advisory/Steering Committee	Email

PLANNING COMMITTEE MEMBERS

Name	Agency	Title/Role	Advisory/Steering Committee	Email

DECISION MAKING STRUCTURE

Define how decisions will be made:

VISION STATEMENT

Define your vision for the SparkPoint Center:

Statement Examples:

SparkPoint <center> envisions a future where all students and their families are able to achieve and maintain financial stability. To realize this vision, SparkPoint's mission focuses on providing services that can help families improve credit scores, reduce debt, build income, and build and save assets.

Our vision for SparkPoint <center name> is a center that meet students' basic needs through food security, job placement/opportunities and connecting them to services regarding individual needs. The center provides supports that lead to student academic success, student persistence, student retention, and degree completions, with fewer students on academic probation. It serves as a hub of coordination between internal and external partners and is seen as a vital part of an institution dedicated to student success.

TARGET AUDIENCE

Define your target audience:

Statement Examples:

East County SparkPoint – Target Population

The target population for the East Contra Costa SparkPoint includes residents who do not yet meet the self-sufficiency standard, as established by the Insight Center for Community Economic Development (insightcced.org). The SparkPoint will prioritize service to residents of Bay Point, Pittsburg, and Antioch, but will not make residency of these communities a requirement for membership. The East Contra Costa SparkPoint will strive to ensure that its membership base reflects the full spectrum of those who fall below the self-sufficiency standard.

SERVICES

SparkPoint _____ will provide _____ students and local community residents with the following services:

Financial	Career & Education	Basic Needs

For the subcategories below, list a description of the services offered:

FINANCIAL COACHING

Example language: Knowing how to manage your money, credit and bank account is very important and the financial services provided through SparkPoint will help anyone manage their finances better. Financial coaches will work one-on-one with clients to address financial issues, create budgets and develop actions plans to adhere to the budget.

BENEFITS ENROLLMENT & ADVOCACY

Example language:

SparkPoint assesses whether individuals are qualified for these benefits. Individuals will be provided with information regarding the various public benefit programs they are qualified for and referral the appropriate agency to make application. SparkPoint provides assistance with the application process.

Benefit Advocates provide critical peer- based information, support, and advocacy services to CalWORKs and other low-income parents, teaching them self-advocacy skills to access the support services and resources they need to

support their families, complete education and training programs, and attain living wage jobs.

CalWORKs-specific advocacy services include:

- counseling and support services for domestic violence
- extensions of the five-year lifetime limit on welfare
- accommodations for learning disabilities
- resources for childcare
- transportation
- books and school supplies
- welfare-to-work plans focusing on education and training programs that lead to higher-wage employment.

STRATEGY FOR REFERRALS

Example language:

_____ will work with the client to identify appropriate referrals and provide a soft hand-off between client and referral service. Appropriate referrals will require the establishment of robust linkages with resources in the community related to housing, legal aid, and healthcare. Key partners include, but are not limited to the following:

Provider	Services

PARTNER LIST

Fin On-Campus Partners	Description of Program/Agency	Description of Relationship & Services Offered	Contact & Agreement/ MOU Status

PARTNERSHIP AGREEMENTS

SERVICE INTEGRATION

Goal	How? Strategy completed to achieve goal	Who? All Partners/ Core Partners/Staff
Have a clear agreed upon shared mission/vision and understanding how their roles fit-into or impact the larger SparkPoint mission.		
Demonstrate a shared brand, viewing themselves as SparkPoint staff in addition to being staff of their individual partner agency (e.g., introducing themselves as part of SparkPoint when interacting with clients).		
Use a standardized vocabulary/common language when referring to processes to clients, internal partners, and external public.		
Have a clear referral system in place for clients to access additional services.		
Share a data system and routinely use this system to make decisions concerning center performance, strategy and/or clients.		
Communicate about decisions and have a unified and clear decision-making process that is shared across partners/programs.		
Have a shared logic model and goals and share progress and accountability equally with partner agencies.		
Responsibilities reflect a service-oriented approach where individual staff roles and responsibilities crossover what were previously separate jobs/functions.		
Funding streams support the collaborative and staff use requirements from funding streams creatively to allow clients to experience seamless services.		
Take responsibility for ongoing casework of a client that spans across traditional program groupings (e.g., income support, workforce and benefits programs).		
Hold continual training and development at regular intervals. Trainings are structured to meet the changing needs of staff.		
Have a streamlined intake and assessment process across multiple programs and regularly utilize the information to make decisions about clients.		

STAFFING

Ex. Statement

SparkPoint _____ is staffed with a _____, _____, and _____. In addition, an _____ from the _____ will dedicate a portion of their job responsibilities to SparkPoint services.

Position	Job Responsibilities	Start Date & FTE	Contact Information
Center Director	Ex. Responsible for planning, directing, and overseeing the SparkPoint Center at post-secondary institutions that support students and community members. S/he/they builds and maintains on and off-campus partnerships, supervises staff, manages the budget, oversees data and reporting, and leads fundraising efforts.		
Site Coordinator	Ex. Responsible for implementing SparkPoint programming, data management and reporting, and SparkPoint center operations. S/he/they provides general office manage and administrative support for the site. Promotes the availabilities of SparkPoint Services on campus among students, faculty, and staff. Sometimes also provides financial coaching as part of the role.		
SparkPoint Financial Coach	Ex. Provides one-on-one personalized financial coaching to students and community members to create and maintain their budget, build savings, establish good financial habits, access banking and financial products, manage their credit, screen and enroll in public benefits, provide basic needs supports, and connect to additional resources. Builds relationships with students and community members. Supports individuals to set and track goals and conducts follow up as necessary. Utilizes a holistic, family-centered approach as necessary. Conducts data entry.		
Student Assistant	Ex. Supports the Site Coordinator around data entry, running reports, scheduling, or interacting with students to respond to questions about the SparkPoint center. May screen students and community members for public benefits. May support on-site food pantry or additional projects.		
Volunteer	Ex. Supports SparkPoint centers through conducting workshops, supporting events, supporting food pantries, or conducting financial coaching (for long-term volunteers).		
Financial Aid Technician			
Career Coach			

STAFF DEVELOPMENT/ON-BOARDING SCHEDULE:

	Prepare (1-4 weeks prior to start)	Welcome/Orient (First 1-2 weeks)	Connect/Integrate (First 1-3 months)
Manager			
HR			
Facilities/ IT			
Employee			

HIRING TIMELINE

Ex. language & timeline.

The timeline for hiring the _____, _____ and _____ were completed in _____. Positions are funded permanently by _____. The _____ will dedicate .25 FTE to the SparkPoint Center from their institutional role as the _____.



SCHEDULING

Use the chart to plan the schedule for the SparkPoint's operation at initial launch.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Morning							
Afternoon							
Evening							

LOCATION

SparkPoint Center Address: _____

Phone Number: _____

E-Mail: _____

MARKETING AND OUTREACH

Define Marketing Plan:

BUDGET PLAN

REVENUE	YEAR 1	YEAR 2	YEAR 3
Government grants			
Institutional funding			
Foundation grants			
Individual donations			
Earned income			
Other revenue			
TOTAL REVENUE			

EXPENSES			
PERSONNEL COSTS			
Staff salaries and wages			
Benefits			
PROFESSIONAL FEES/CONTRACTS			
Consultants/professional fees			
Subcontracts with partner agencies			
PROGRAM AND OPERATING COSTS			
Program Supplies			
Student incentives			
IT equipment/software			
Cell phone & internet			
Data collection/evaluation			
Postage and shipping			
Rent and occupancy			
Printing and publications			
Marketing and outreach			
Travel			
Conferences, meetings, workshops, training			
Interest			
Depreciation, depletion, etc.			
Admin and other expenses not covered above			
TOTAL EXPENSES			

SUSTAINABILITY PLAN

I. Timeline of Programming, History, Milestones

II. Our Problem Analysis

III. Our Sustainability

IV. Key Levers in Our Sustainability

V. Our Core Programs

VI. Policy Landscape and Opportunities

VII. Current Revenue Model

VIII. Ideal/Intended Revenue Model

IX. Leadership and Human Capital

X. Key Decisions

XI. Measuring Our Progress

EVALUATION AND LEARNING

INSTRUCTIONS

Briefly describe your program using the instructions below and fill out each column of the logic model. Each outcome (or goal) should directly relate to program activities and the target population (described in outputs) that you will serve in this upcoming fiscal year.

- Inputs.** Briefly describe the resources and partnerships that will be essential for implementing your program successfully.
- Activities.** Briefly describe the activities that your center plans to conduct in this upcoming fiscal year.
- Outputs.** Briefly describe the measures you will use to understand how successfully the program has been implemented as planned. List the specific outputs that you will measure, which result from each proposed goal and activity. Outputs can include the number of people served as well as short-term measurable
- Outcomes (Goals).** Briefly describe the outcomes (or goals) you will use to determine whether your program has successfully helped clients reach their goals. List the specific outcomes that you will measure, which result from each proposed goal and activity. Outcomes include intermediate- or long-term impacts that represent achievement toward your program goal. For outcomes marked with an asterisk (*), please refer to the table below for definitions.

INPUTS What resources are used to implement the program?	ACTIVITIES What activities are planned?	OUTPUTS Who was served?	OUTCOMES How successful are the activities in helping clients reach goals?

DATA TACKING

Case Management Database:

CLIENT JOURNEY

Put a picture of your finalized client journey map here: