

Planning Committee Minutes
Wednesday, March 13, 2024
via zoom/telephone/in person

Part 1 of 2

Planning Committee Minutes
Wednesday, March 13, 2024
via zoom/telephone/in person

MEMBERS PRESENT: Steve Hodgens, Paula Freedman
MEMBERS EXCUSED: Shirley Copes
MEMBERS ABSENT: None
STAFF PRESENT: Carolyn D. Brown, Katy Hollins, Rebekkah Heberle, Kate Tohafjian,
Stephanie Bingham, Mary Beth Welch, Todd Goehle

CALL TO ORDER:

The March 13, 2024 Planning Committee meeting was called to order at 4:45 PM by Steve Hodgens. It was noted for the record that a quorum was present.

APPROVAL OF PREVIOUS MINUTES

Paula Freedman made a motion to approve the February 2024 minutes, seconded by Steve Hodgens. The motion carried.

PRESENTATIONS:

HS/EHS ERSEA Overview – presented by Katy Hollins, ERSEA Coordinator

ERSEA was defined briefly for the board members upon their request.

- Eligibility- based off age and income (homelessness and foster, public assistance and low income getting priority)
- Recruitment- we are beginning our recruitment season now, we recruit for twice the number of applications as seats available (about 1600 HS and 400 EHS) to find the most in need of the program
- Selection- there is a ranked waitlist to determine the most in need of the program we use for selection
- Enrollment
- Attendance- the goal is 85% attendance rate

We then discussed the selection criteria, developed by analyzing data (community assessment, our Head Start data, etc) to identify concerns in the community that hinder access to early education. There were changes to the selection criteria this year based on the findings of that data.

- new category - housing insecurity - 5 pts
- increase of points - food insecurity - 1 pt to 3 pts
- increase of points - large family - 1 pt to 3 pts
- decrease of points - undiagnosed depression and anxiety - 5 pts to 3 pts
- elimination of category - kinship care - folded into foster care definition
 - kinship care is defined as any family member that is not mom or dad (grandparent, aunts, uncles, siblings) that are granted custody of the child versus foster care which are usually adults unknown to the children/family

Board members asked about the ranked waiting list and how it is applied to siblings of a child already enrolled. It was explained that we do like to work with families so whenever possible we try to enroll siblings. The ranked waitlist is still consulted to take the neediest child however a sibling may be given priority over another child with similar points.

Board Members asked about those with low attendance staying in a seat while there are kids on the waiting list. It was explained that some of it is due to sickness as children do spread illness while playing/ learning with each other. Head Start also meets families where they are so we try to put interventions in place to improve attendance whenever possible however if the attendance does not improve we will drop the child and enroll a child from the waiting list.

Paula Freedman made a motion to approve the HS/EHS ERSEA Overview. It was seconded by Steve Hodgins. The motion carried

**Presentation of CSBG (Community Service Block Grant) Annual Program Report – 2023
Presented by Stephanie Bingham, Associate Director & Mary Beth Welch, Director of
Family Services**

It was presented to the Board that CSBG requires that the Annual Program Report be presented to Board annually. The Annual Program Report is comprised of FNPI's (Family National Performance Indicators). PEACE, Inc. reports on 34 FNPI's and 46 Services. Variances of +/- 20% of established targets are considered acceptable. Three of the reported FNPI's were over/under the threshold.

FNPI 1d – The number of unemployed adults who obtained and maintained employment for at least 180 days (up to living wage) Number of participants 32, Target 8, Actual Results 1, Target Accuracy 13%

Brought attention to our follow-up methods, and we've made plans to utilize our calendar reminders for quarterly check-ins with clients who have achieved funneled outcomes. This was discussed at our FRC Coordinators meeting on 03/04/24. (noted on final page)

FNPI 2h – The number of individuals who obtained a recognized credential, certificate, or degree relating to achievement of educational or vocational skills. Number of participants 42, Target 7, Actual Results 5, Target Accuracy 71%

This is primarily due to confusion on what qualifies as "vocational skills" and how we should record these services in GoEngage. Since completing FY23, we've added a description column to our list of services to help show GoEngage users how to record this service. The list is attached to the end of this presentation.

FNPI 3b – The number of individuals who achieved and maintained capacity to meet basic needs for 180 days. Number of participants 48, Target 8, Target Accuracy 150%

CEFRC had 3 individuals unexpectedly reach out to provide case management updates.

The APR summary was given to the Committee members for their review. PEACE, Inc. reports on the following indicators: Employment, Education, Income and Asset Building, Housing, Health, and Civic and Community Engagement. The FNPI's for each indicator was presented, and it was shared which program contributes to each category.

The report concluded with a summary of improvement opportunities:

- Ensure integrity of GoEngage database and continue to review records.
 - Monthly audits and site visits for training and/or support.
 - Work directly with GoEngage Engineers to continue enhancements and learning.
 - The CSBG/NPI task is now available and can complete the FRCs, Free Tax, and Head Start PPR tables each quarter.
 - Work with Head Start GoEngage administrators to connect and compare our data for reporting.
- Use PPR/APR as a Data Driven Decision Tool – compare to monthly Board Reports and Census
 - Plans to focus on assisting staff with client transportation (SRV 7d).
 - Created a uniform PPR table for all FRCs to use so they can add FNPI & SRVs they may have excluded on their Work Plans.
 - Added PPR review to list of requirements for monthly or quarterly audits when Steph is on a site visit – will compare GoEngage results to reported results from Coordinators and Directors.
- Stephanie Bingham, FRC Associate Director is a member of NYSCAA's CAPTW Affinity Group which provides direct access to a NYS CSBG analyst to assist with the integrity of our quarterly and annual reports (meet monthly).
- Added the new Workforce Development program and Free Tax Prep to our FY24 CSBG Work Plan to capture all possible outcomes for employment, education, and income/asset building.

Paula Freedman made a motion to approve the CSBG 2023 Annual Progress Report. It was seconded by Steve Hodgins. The motion carried

COMMUNITY NEEDS ASSESSMENT UPDATE

VP of Operations and Strategy Todd Goehle provided an update on the Community Needs Assessment which will be presented at the full Board Meeting on March 25, 2024.

GRANT SUMMARY REPORT:

VP of Operations and Strategy Todd Goehle provided an overview of the grants summary.

OLD BUSINESS:

Executive Director Carolyn Brown reported that Champions of Diversity celebrations will be held on May 22, 2024 at the National Veterans Resource Center at SU FROM 5:30 pm to 8:00 pm and the honorees are Joe O'Hara, Rasheada Caldwell, and Tamika Otis.

NEW BUSINESS:

The new Food Services Director, Karl Dawkins, will begin on Monday, March 18th

OTHER:

None.

ADJOURNMENT

The meeting was adjourned at 5:30 PM.



2023 Annual Progress Report Review

March 2024

Stephanie Bingham

Mary Beth Welch

March 13, 2024

The Annual Progress Report is submitted to Department of State, Community Service Block Division annually. The report on provides a summary of our CSBG funded program activities achievements(data counts & narratives) as well as the demographics of participants served.

- CSBG year – 10/1/22 – 9/30/23
- Work Plans are compiled in Q3/Q4 of CSBG year
- Amendments are typically submitted in Q3/Q4 of CSBG year
- Variances +/- 20% require an explanation
- APR submitted to the DOS 2/6/24
- APR exceptions/responses submitted to DOS – TBD by DOS
- Report on Individual and Family National Performance Indicators (FNPI's) & Services Provided
- Total client count, as reported on 2023 APR: 8,895
 - 499 client increase from 2022 APR

2023 Annual Progress Report

Employment Indicators

FNPI	Number of participants	Target	Actual Results	Target Accuracy
FNPI 1b – The number of unemployed adults who obtained employment (up to a living wage)	32	19	19	100%
FNPI 1c – The number of unemployed adults who obtained and maintained employment for at least 90 days (up to a living wage)	32	13	12	92%
FNPI 1d – The number of unemployed adults who obtained and maintained employment for at least 180 days (up to living wage)	32	8	1	13%

Services Provided:

SVR 1C – Youth Summer Work Placements	6
SRV 1d Apprenticeship/Internship	3
SRV 1i Coaching	10
SRV 1j Resume Development	15
SRV 1l Job Referrals	39
SRV 1q Employment Supplies	7

Programs – FRC's

Activities – Family Development, Job Fairs, Referrals

FNPI 1d is 67% under – Brought attention to our follow-up methods, and we've made plans to utilize our calendar reminders for quarterly check-ins with clients who have achieved funneled outcomes. This was discussed at our FRC Coordinators meeting on 03/04/24.
(noted on final page)

2023 Annual Progress Report

Education Indicators

FNPI	Number of participants	Target	Actual Results	Target Accuracy
FNPI 2b – The number of children (0 to 5) who demonstrated improved positive approaches toward learning, including improved attention skills.	1015	482	482	100%
FNPI 2c – The number of children (0 to 5) who demonstrated skills for school readiness.	103	84	80	95%
FNP 2c2 – The number of children and youth who demonstrated positive approaches toward learning, including improved attention skills. 1 st grade – 8 th grade	103	84	80	95%
FNPI 2d – The number of children and youth who are achieving at basic grade level (academic, social, and other school success skills).	103	84	80	95%
FNPI 2d2 – 1 st grade – 8 th grade	103	84	80	95%

2023 Annual Progress Report

Education Indicators

FNPI	Number of participants	Target	Actual Results	Target Accuracy
FNPI 2e – The number of parents/caregivers who improved their home environments.	42	24	20	83%
FNPI 2f – The number of adults who demonstrated improved basic education.	42	12	11	92%
FNPI 2g – The number of individuals who obtained a high school diploma and/or obtained an equivalency certificate or diploma.	42	3	3	100%
FNPI 2h – The number of individuals who obtained a recognized credential, certificate, or degree relating to the achievement of educational or vocational skills.	42	7	5	71%

FNPI 2h is 9% under – This is primarily due to confusion on what qualifies as “vocational skills” and how we should record these services in GoEngage. Since completing FY23, we’ve added a description column to our list of services to help show GoEngage users how to record this service. The list is attached to the end of this presentation.



2023 Annual Progress Report

Education Indicators

Services Provided:

• SRV 2a Early Head Start	226
• SRV 2b Head Start	789
• SRV 2k School Supplies	460
• SRV 2l Before and After School Activities	51
• SRV 2m Summer Youth Recreational Activities	59
• SRV 2p Mentoring	135
• SRV 2w Parenting Supports	21
• SRV 2bb Scholarships	9
• SRV 2cc Home Visits	37

Programs – BBBS, FRCs, Head Start

Activities – FRC Back-to-School supply drives, Parenting Education Classes, grant activity

2023 Annual Progress Report

Income and Asset Building

FNPI	Number of participants	Target	Actual Results	Target Accuracy
FNP 3a – The number of individuals who achieved and maintained capacity to meet basis needs for 90 days.	48	24	21	88%
FNP 3b – The number of individuals who achieved and maintained capacity to meet basis needs for 180 days.	48	8	12	150%
FNPI 3c – The number of individuals who opened a savings account of IDA	48	1	1	100%
FNPI 3d – The number of individuals who increased their savings.	48	8	7	88%
FNPI 3g – The number of individuals who improved their credit scores	100	102	100	98%
FNPI 3h – The number of individuals who increased their net worth	48	12	14	117%



2023 Annual Progress Report

Income and Asset Building

Services Provided

• SVR 3g Child Support Payments	1
• SRV 3h Health Insurance	13
• SRV 3i Social Security/SSI Payments	29
• SRV 3k TANF Benefits	29
• SRV 3l SNAP Benefits	721
• SRV 3o VITA, EITC, or Other Tax Preparation programs	1383

Programs – FRC's

Activities – Family Development, community outreach, programming, financial literacy classes

FNPI 3b is 30% over – CEFRC had 3 individuals unexpectedly reach out to provide case management updates.

2023 Annual Progress Report

Housing Indicators

FNPI	Number of participants	Target	Actual Results	Target Accuracy
FNPI 4b - The number of households who obtained safe and affordable housing.	89	19	20	105%
FNPI 4c – The number of households who maintained safe and affordable housing for 90 days.	89	12	12	100%
FNPI 4d – The number of households who maintained safe and affordable housing for 180 days.	89	5	6	120%
FNPI 4e – The number of households who avoided eviction.	89	30	26	87%



2023 Annual Progress Report

Housing Indicators

FNPI	Number of participants	Target	Actual Results	Target Accuracy
FNPI 4h The number of individuals with improved energy efficiency and/or energy burden reduction in their homes.	230	231	204	88%
FNPI 4z.1 The number of individuals who will obtain household items to improve their homes' safety and quality of life(beds, furniture, appliances etc.	89	100	89	89%



2023 Annual Progress Report

Housing Indicators

Services Provided:

• SRV 4c Rent Payments (includes Emergency Rent Payments)	6
• SRV 4d Deposit Payments	4
• SRV 4g Landlord/Tenant Mediations	5
• SRV 4i Utility Payments (LIHEAP-includes Emergency Utility Payments)	392
• SRV 4n Transitional Housing Placements	4

Programs – Energy & Housing, FRCs

Activities – Collaborations, referrals



2023 Annual Progress Report

Health & Social/Behavioral Development Indicators

FNPI	Number of participants	Target	Actual Results	Target Accuracy
FNPI 5a – The number of individuals who demonstrated increased nutrition skills.	180	65	64	98%
FNPI 5b – The number of individuals who demonstrated improved physical health and well-being.	308	140	126	90%
FNPI 5C – The number of individuals who demonstrated improved mental and behavioral health and well-being.	380	167	175	105%
FNPI 5d – The number of individuals who improved skills related to the role of adult parents/caregivers.	108	30	28	93%
FNPI 5e – The number of parents/caregivers who demonstrated increased sensitivity and responsiveness in their interactions with their children.	108	20	20	100%

2023 Annual Progress Report

Health & Social/Behavioral Development Indicators

FNPI	Number of participants	Target	Actual Results	Target Accuracy
FNPI 5f – The number of seniors (65+) who maintained an independent living situation.	380	280	301	108%
FNPI 5g –The number of individuals with disabilities who maintained an independent living situation.	1701	535	622	116%
FNPI 5h– The number of individuals with chronic illness who maintained an independent living situation.	108	30	30	100%



2023 APR - Annual Progress Report

Health & Social/Behavioral Development Indicators

Services Provided:

• SRV 5d Vision Screening	1108
• SRV 5g Maternal/Child Health	16
• SRV 5v Mental Health Counseling	71
• SRV 5z Domestic Violence Support Grp Meetings	32
• SVR 5x Domestic Violence Programs	1
• SRV 5dd Child Dental Screenings/Exams	463
• SRV 5ii Prepared Meals	67040
• SRV 5jj Food Distribution	1074
• SRV 5mm Parenting Classes	22
• SRV 5nn Hygiene kits/boxes	928

Programs – FRCs, Senior Nutrition, Senior Services

Activities – Food pantries, Diaper Bank, Food Delivery Program, referrals, client visits, collaborations



2023 Annual Progress Report

Civic Engagement and Community Involvement

FNPI	Number of participants	Target	Actual Results	Target Accuracy
FNP 6a.2 - The number of Community Action program participants who improved their social networks.	100	50	52	104%
FNP 6a.3 - The number of Community Action program participants who gained other skills, knowledge and abilities to enhance their ability to engage.	100	85	86	101%

Programs – ECC, Foster Grandparents
Activities – Client engagement, socialization



2023 Annual Progress Report

Services Supporting Multiple Domains

Services Provided:

• SRV 7a Case Management	95
• SRV 7b Eligibility Determinations	33
• SRV 7c Referrals	324
• SRV 7d Transportation Services (e.g. bus passes, bus transport, support for auto purchase or repair; including emergency services)	1451
• SRV 7h Birth Certificates	4
• SRV 7i Social Security Card	1
• SRV 7j Drivers License	5
• SRV 7m Legal Assistance	7
• SRV 7n Emergency Clothing Assistance	464
• SRV 7o Mediation/Customer Advocacy Interventions	51

2023- Annual Progress Report

Improvement Opportunities

- *Ensure integrity of GoEngage database and continue to review records*
 - *monthly audits and site visits for training and/or support*
 - *work directly with GoEngage Engineers to continue enhancements and learning*
 - *the CSBG/NPI task is now available and can complete the FRCs, Free Tax, and Head Start PPR tables each quarter*
 - *work with Head Start GoEngage administrators to connect and compare our data for reporting*
- *Use PPR/APR as a Data Driven Decision Tool – compare to monthly Board Reports and Census*
 - *plans to focus on assisting staff with client transportation (SRV 7d)*
 - *created a uniform PPR table for all FRCs to use so they can add FNPI & SRVs they may have excluded on their Work Plans*
 - *added PPR review to list of requirements for monthly or quarterly audits when Steph is on a site visit – will compare GoEngage results to reported results from Coordinators and Directors*
- *Steph is a member of NYSCAA's CAPTW Affinity Group which provides direct access to a NYS CSBG analyst to assist with the integrity of our quarterly and annual reports (meet monthly)*
- *Added the new Workforce Development program and Free Tax Prep to our FY24 CSBG Work Plan to capture all possible outcomes for employment, education, and income/asset building*

Project & Services Guide

PROJECT SERVICES

FNPI & SRVs

NOTES/EXAMPLES

PROJECT	SERVICES	FNPI & SRVs	NOTES/EXAMPLES
Family Resource Centers	*Add A New Family*		
	Appointment		
	Follow Up		
	Form of ID		
	Proof of Current Address		
	Proof of Income		
	Signed Intake		
	Walk-In		
Civic Engagement & Community Involvement			
Community Involvement	Adult Recreational Activities	FNPI6a.2	
	Citizenship Classes	SRV6d	
	CNYCF Life Needs Assessment		
	Community Fair	STR 6 G2h	
	Focus Group/Survey		
	Follow Up	SRV7a	
	Information/Referral	SRV7c	
	Language Translation	FNPI7z1	
	Volunteering	FNPI 6a	
	Voter Education & Access	SRV6a	
Immigration Support Services	Asylum Seeker Support Services	SRV7l	
	Eligibility Determination	SRV7b	
	Follow Up	SRV7a	
	Immigration Support Services	SRV7l	
	Information/Referral	SRV7c	
	Language Translation	FNPI7z1	
	Migrant Support Services	SRV7l	
	Refugee Support Services	SRV7l	
ReEntry Services	Eligibility Determination	SRV7b	
	Follow Up	SRV7a	
	Information/Referral	SRV7c	
	Language Translation	FNPI7z1	
	Eligibility Determination	SRV7b	
Veteran Supports	Follow Up	SRV7a	
	Information/Referral	SRV7c	
	Language Translation	FNPI7z1	
	Eligibility Determination	SRV7b	
	Follow Up	SRV7a	
	Information/Referral	SRV7c	
	Language Translation	FNPI7z1	
Education			
Adult Education	Adult Literacy Classes	SRV2r	
	Applied Technology Class	SRV2x	
	Basic Education Class	SRV2t	
	Chromebook		

if client made appointment before coming to receive services whenever you contact them to try to get paperwork

copy of drivers license, state ID, benefit card (photo ID ideal, but not required) copy of piece of mail with their name and current address on it

SNAP letter with household members ideal, DSS Budget Sheet, award letters, bank statements with monthly deposits, tax returns both client and staff member signed with dates

if client visited site for services without an appointment or call

whenever we host a group of adults who aren't in an existing program getting someone enrolled, providing the classes

only when individuals complete the Community Foundation's Life Needs survey

when we host tabling events for the community or take clients to one and stay with them programming surveys, internal focus groups for PEACE

whenever you contact a client to check on something for the Community Involvement Project

whenever you provide info or a referral for the Community Involvement Project

internal or external volunteer opportunities - note where

providing voter info., help with registering to vote or driving to polls

when we provide food, clothing, info, shelter, etc. on asylum help ONLY

whenever you contact a client to check on something for the Immigration & Refugee Support Services Project

when we provide food, clothing, info, shelter, etc. on immigration help ONLY referring to internal or external program (notes should specify)

when we provide food, clothing, info, shelter, etc. on migrant help ONLY

when we provide food, clothing, info, shelter, etc. on refugee help ONLY

whenever you contact a client to check on something for the ReEntry Services referring to internal or external program (notes should specify)

whenever you contact a client to check on something for the Veteran Supports referring to internal or external program (notes should specify)

when we enroll or provide any type of class for reading

any type of tech class (tablet, internet safety, etc.)

when we enroll or provide any type of class other than reading or financial

when client uses FRC Chromebook for adult education purposes

Project & Services Guide

PROJECT	SERVICES	FNPI & SRVs	NOTES/EXAMPLES
	College Application	SRV2aa	help with a college application
	Eligibility Determination		
	ESL Class for Adults	SRV2s	when we enroll or provide English as a Second Language (speaking English) classes
	Financial Literacy for Adults	SRV2z	any type of class on finances (budgeting, banking, wills, etc.) for adults
	Focus Group/Survey		programming pre & post surveys, internal focus groups for PEACE
	Follow Up	SRV7a	whenever you contact a client to check on something for the Adult Education Project
	High School Equivalency (GED) class	SRV2u	attends GED class at site
	Information/Referral	SRV7c	
	Language Translation	FNPI7z1	
	Leadership Training	FNPI2v	
	Mediation/Customer Advocacy	SRV 7o	any type of leadership/mentoring training (example: train the trainer classes)
	NYS 5-Hour Driver's Course	SRV2t	when we speak or support client(s) during meetings/assessments/interviews/etc.
	Obtained Associate's Degree	FNPI2i	when we pay for the 5-hour driver's course
	Obtained Bachelor's Degree	FNPI2j	when a client earns their degree after working with us on their goal
	Obtained High School Diploma or GED	FNPI2g	when a client earns their degree after working with us on their goal
	Obtained vocational credential, certificate or degree	FNPI2h	when a client earns a certificate or credential through vocational programs/services
	Parenting Class	SRV2w	when we enroll or provide classes outside of Parents with Hope, Fatherhood, and Live & Learn
	Parent reports improved home environment	FNPI2e	
	Post-Secondary Prep	SRV2y	
	Scholarship Assistance	SRV2aa	when we assist <i>applying</i> for a scholarship or financial aid
	School Supplies	SRV2k	provided supplies for education (notebooks, backpacks, etc)
	Tutoring/Mentoring	SRV2p	
Child & Teen	Before & After School Programs	SRV 2l	use for any groups that aren't already saved as an FRC Classroom
	Behavior Improvement Programs	SRV 2o	attitude, self-esteem, Dress for Success, etc. not already an FRC Classroom
	Campership/Scholarship Provided	SRV 2bb	when we pay for summer camp or provide a scholarship
	Chromebook		whenever you use the Chromebooks to provide a service
	College-Readiness Prep	SRV2h	whenever a kid uses our technology to complete a service
	Computers Software, & Other Equipment		whenever we take a group of kids somewhere who aren't in an existing program
	Field Trip		any type of class on finances (budgeting, banking, wills, etc.)
	Financial Literacy for Youth	SRV2f	
	Follow Up	SRV7a	
		Information/Referral	SRV7c
	Language Translation	FNPI7z1	any type of leadership/mentoring training (train the trainer)
	Leadership Training	SRV2q	
	Literacy/English Language Education	SRV 2g	when we speak or support client(s) at meetings/assessments/interviews/etc.
	Mediation/Customer Advocacy	SRV 7o	when a client 18 and younger earns their degree after working with us on their goal
	Obtained High School Diploma or GED	FNPI2g	when a client 18 and younger earns their degree after working with us on their goal
	Obtained vocational credential, certificate or degree	FNPI2h	teen-pregnancy supports
	Parenting Support	SRV 2w	
	Scholarship Assistance	SRV 2h	when we assist <i>applying</i> for a scholarship or financial aid
	School Supplies	SRV 2k	provided supplies for education (notebooks, backpacks, etc)
	Summer Education Programs	SRV2n	use for any gatherings that aren't already saved as an FRC Classroom

Project & Services Guide

PROJECT	SERVICES		FNPI & SRVs	NOTES/EXAMPLES
	Summer Youth Recreational Programs	Tutoring/Mentoring		
Career Coaching & Support	*Employment & Legal*		SRV2m	use for any gatherings that aren't already saved as an FRC Classroom
			SRV 2p	
		Background Check	SRV1n	when we pay for or provide a background check
		Chromebook		
		Employment Equipment	SRV1q	For trades where "equipment" is required (boots, helmets, safety vests, goggles)
		Follow Up	SRV7a	
		Information/Referral	SRV7c	
		Interview Skills	SRV1k	when we practice job interviews or provide interview trainings at our sites
		Job Change for Higher Pay	FNPI1h.1	when someone is employed, but gets a raise or changes jobs for a wage increase
		Job Change for More Benefits	FNPI1h.3	when someone employed and starts to get benefits that weren't available to them before
Skills & Experience		Job Change for More Hours	FNPI1h.2	when someone is employed and starts to have more hours which makes them more money
		Job Placement (previously unemployed)	FNPI1b	
		Job Referral	SRV1l	when we use our contacts to directly connect someone to employment
		Job Search Coaching	SRV1h	whenever you discuss employment practices or plans to achieve job goals
		Kept new job for 90 days	FNPI1c	after we help someone get a job and they keep that job for at least 90 days
		Kept new job for 180 days	FNPI1d	after we help someone get a job and they keep that job for at least 180 days
		Office Supplies	SRV1q	For smaller in-office supplies (notebooks, lunch boxes, anything similar to school supplies)
		Professional Clothing	SRV1q	
		Resume Development	SRV1j	
Legal & Document Assistance		Apprenticeship/Internship	SRV1d	when we enroll someone or provide an internship opportunity
		Job Shadowing	SRV1b	
		Self-Employment Skills	SRV1e	when we enroll or provide trainings at our sites
		Summer Youth Employment	FNPI1a, SRV1c	when we employ youth through CNY Works or other programs for the SUMMER
		Vocational Training	SRV1a	when we provide trainings at our sites
		Youth Job Placement (previously unemployed)	FNPI1a, SRV1c	when we help youth younger than 18 years get a job to gain employment skills
		Birth Certificate	SRV7h	when we help someone get their birth cert for employment purposes
		Eligibility Determination	SRV7b	
		Fax/Copies/Computer		when we fax, make copies, or provide computer use for employment purposes
Health & Social/Behavioral Development Services		Follow Up	SRV7c	
		Information/Referral	FNPI7z1	
		Language Translation		when we provide a lock box for work and legal documents
		Lock Box		when we speak or support client(s) at court/assessments/interviews/etc.
		Mediation/Customer Advocacy	SRV 7o	
		Non-Driver's ID		
		Notary Service		
		Passport		
		Social Security Card	SRV7i	when we help someone get their passport for employment purposes
				when we help someone get their social security card for employment purposes

Project & Services Guide

NOTES/EXAMPLES

FNPI & SRVs

SERVICES

PROJECT

	Contraceptives		
	Diaper Bank		
	Family Planning Education		
	Hygiene/Toiletries		
	Information/Referral		
	In-Home Care Session		
	Laundry Voucher		
Misc. Support Services			
	Crisis Response/Call-In Response		
	Domestic Violence Support		
	Eligibility Determination		
	Exercise/Fitness Session		
	Give-A-Holiday		
	Holiday/Other Giveaway		
	Home Visit		
	Information/Referral		
	Laundry (on-site)		
	Substance Abuse Supports		
	Wellness Education		
Housing & Clothing			
Clothing Assistance			
	Clothing Closet		
	Information/Referral		
	Winter Items		
Housing Placement			
	Eligibility Determination		
	Follow Up		
	Information/Referral		
	Kept new housing for 90 days		
	Kept new housing for 180 days		
	Landlord/Tenant Mediation		
	Language Translation		
	Permanent Housing Placement		
	Temporary Housing Placement		
	Transitional Housing (previously unhoused)		
Housing Supports			
	Avoided Eviction		
	Avoided Foreclosure		
	Care & Share Recipient		
	Deposit Payment		
	Eligibility Determination		
	Follow Up		
	HEAP Recipient		

FNPI5b

only record once the family receives gifts, use Eligibility Determination when they do the form when client receives item(s) from us as gifts or during giveaways

SRV2cc

when you wash clients' clothes in the machines at your site

SRV7n

SRV7n

SRV7b

SRV7a

SRV7c

after we help someone get safe & affordable housing and they keep it for at least 90 days

after we help someone get safe & affordable housing and they keep it for at least 180 days

when you speak to a landlord or tenant BEFORE they are renting

FNPI7z1

FNPI4b, SRV4o

when you help someone obtain permanent housing (new apartment or house)

when you help someone obtain temp. housing (emergency shelters, anything with a time limit)

when you help someone who is **unhoused** obtain temp. selter or housing

SRV4m

FNPI4a, SRV4n

record when we help a client avoid eviction (notes must support your work)

record when we help a client avoid foreclosure (notes must support your work)

use this once you know the client got the \$200 benefit (NOT WHEN YOU APPLY)

ONLY when we pay all or a portion of someone's rent deposit

use whenever you apply for benefits or a program

use this once you know the client was approved - can use for proof of income

FNPI4e

FNPI4f

SRV4i

SRV4d

SRV7b

SRV7a

SRV4i

Project & Services Guide

PROJECT	SERVICES	FNPI & SRVs	
		NOTES/EXAMPLES	
Income & Asset Building	Housewares/Furniture	FNPI4z	when we provide items like beds, microwaves, dressers, kitchenware, etc.
	Information/Referral		
	Landlord/Tenant Mediation	SRV4g	when you speak to a landlord or tenant WHILE or AFTER they're renting
	Language Translation	FNPI7z1	when we help someone sign up to test their home or family for lead
	Lead Test Request	SRV4s	ONLY when we pay all or a portion of someone's mortgage
	Mortgage Payment	SVR4e	when we know National Grid approved a client for a budget plan on their unpaid bill
	National Grid Budget Plan	SRV4l	when we enroll someone in a rental assistance program
	Rental Assistance	SRV4l	ONLY when we pay all or a portion of someone's rent
	Rent Payment	SRV4c	
Benefit Coordination	Child Support/Alimony	SRV3g	when we help someone obtain child support/alimony
	Eligibility Determination	SRV7b	always use when we apply for benefits...ONLY record the benefit once someone is officially enrolled
	Follow Up	SRV7a	
	Health Insurance Enrollment	SRV3h	when we help someone obtain health insurance
	Information/Referral	SRV7c	
	Mediation/Customer Advocacy Interventions	SRV7o	when we speak or support client(s) at court/assessments/interviews/etc.
	SNAP Enrollment/Reapplication	SRV3l	when we help someone obtain SNAP benefits
	Social Security Disability Insurance (SSDI)	SRV3i	when we help someone obtain SSD
	Supplemental Security Income (SSI)	SRV3i	when we help someone obtain SSI
	TANF	SRV3k	when we help someone obtain TANF/Public Assistance/Temporary Assistance
Financial	Veteran's Benefits	SRV3j	when we help someone obtain VA benefits
	Eligibility Determination	SRV7b	always use when we apply for benefits...ONLY record the benefit once someone is officially enrolled
	Financial Skills Training	SRV3a	when we enroll or provide someone in a class/group
	First-time Homebuyer Counseling	SRV3d	when we enroll or provide someone in a class/group
	Follow up	SRV7a	
	Improved credit scores	FNPI3f	client reports we helped them improve their credit scores
	Increased net worth	FNPI3g	client reports we helped them increase their net worth
	Increased savings	FNPI3d	client reports we helped them increase their savings
	Information/Referral	SRV7c	
Nutrition	Language Translation	FNPI7z1	when we help someone obtain a loan or grant
	Micro-Loans or Grant Awards	SRV3p	when we help someone open a bank/savings account
	Opened a Savings/IDA Account	FNPI3c, SRV3m	when a client reports to us that they used their savings to buy an expensive item
	Purchased an asset with savings	FNPI3e	**clients must complete the CFPB Financial Well-Being Survey**
	Survey results: improved financial well-being	FNPI3h	when someone from a tax program helps clients out of your site, not just a referral
	Tax Prep	SRV3o	
Food Services	Cooking/Gardening/Nutrition Class	FNPI5a	
	Food Delivery		
	Food Pantry		
	Information/Referral		

Project & Services Guide

FNPI & SRVs

NOTES/EXAMPLES

PROJECT	SERVICES
	Hygiene/Toiletries
	Prepared Meal (On-Site)
	Senior Meal
	Specialty Holiday Food Items
	SNAP
	Table Giveaway (Non-Food Bank)
	Transportation & Daily Services
Daily Services	
	Fax/Copies/Computer
	Follow Up
	Support Conversations
	Language Translation
Transportation	
	Bus Pass
	Emergency Auto Support
	FISH
	Gas Voucher
	Information/Referral
	Rides Provided

when you give out items on pantry days

when you give out turkeys, hams, etc. for the holidays

SRV/3I

use when client just needs time to talk to you and it's not a crisis

if parts are purchased for clients' vehicles