

# Measuring Success in the Stability Matrix

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## To our Partners:

United Way of Marathon County has set out to lift 10,000 community members into financial stability by the year 2033. Along the way of accomplishing that goal, it requires all of us to rethink our strategies and what it means to serve the most vulnerable in our community. United Way of Marathon County is focusing in on investing in results-oriented projects and programs that ensure a strong network of basic needs resources to stabilize households, along with supportive services designed to break down barriers to help lift families to financial stability. Historically, it was common practice to provide your service, and then move on to the next guest that needed assistance. As we think about ensuring financial stability is achieved, we must think beyond the individual services we all provide and look at the entire picture of financial stability.

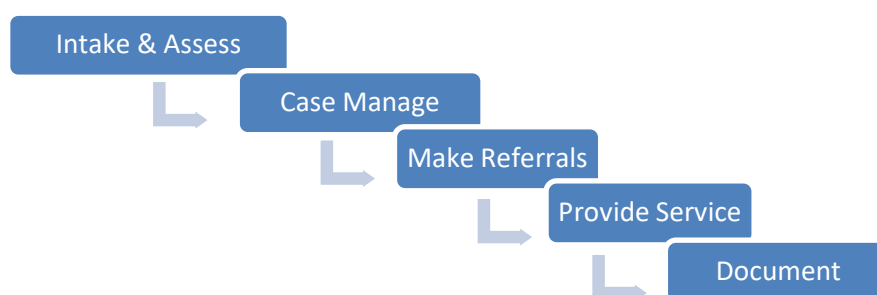
This will require a change in the way we all follow up, case manage, and interact with the individuals we serve.

Outlined in this document are resources designed to help you effectively “case manage” and dig deeper into the causes of financial instability in our community. By addressing the largest financial burdens on households, connecting your guests to resources to relieve that burden, and providing the services you already provide, we can start to move the needle on lifting families into financial stability.

Going beyond the services you typically provide can seem intimidating if it’s something you have not done; however, we have simplified this process for you. We believe that we can uncover a lot with these simple questions:

- **Is your current income enough to afford the foods your household needs?**
- **Is your current income covering the costs of your housing?**
- **Is your current income sufficient to meet your needs?**
- **Do you have children?**
  - **If yes, do you have affordable & quality childcare?**
- **Is anyone in your household experiencing mental health issues?**
  - **If yes, identify between behavioral health priorities & make appropriate referral.**

By asking these questions, documenting the outcome, and offering referrals to services outside of our respective agencies, we can identify if assistance is needed beyond the immediate service that we are providing and make referrals to the appropriate agency, resulting in a higher likelihood of achieving true financial stability.



## How does one measure or assess stability?

A stability matrix is an assessment and outcome measurement tool based on the federal outcomes standard ROMA (Results-Oriented Management and Accountability). The original tool has 25 individual scales, each measuring observable change in some aspect of stability. It is designed to be flexible: any combination of scales can be used, based on the goals and strategies of individual programs. In addition, each scale was developed independently on a continuum from “in-crisis” to “thriving” and allows for the measurement of client progress or maintenance over time (*administered at initial intake then periodically – 3 months, 6 months, final exit, follow up, etc.*)

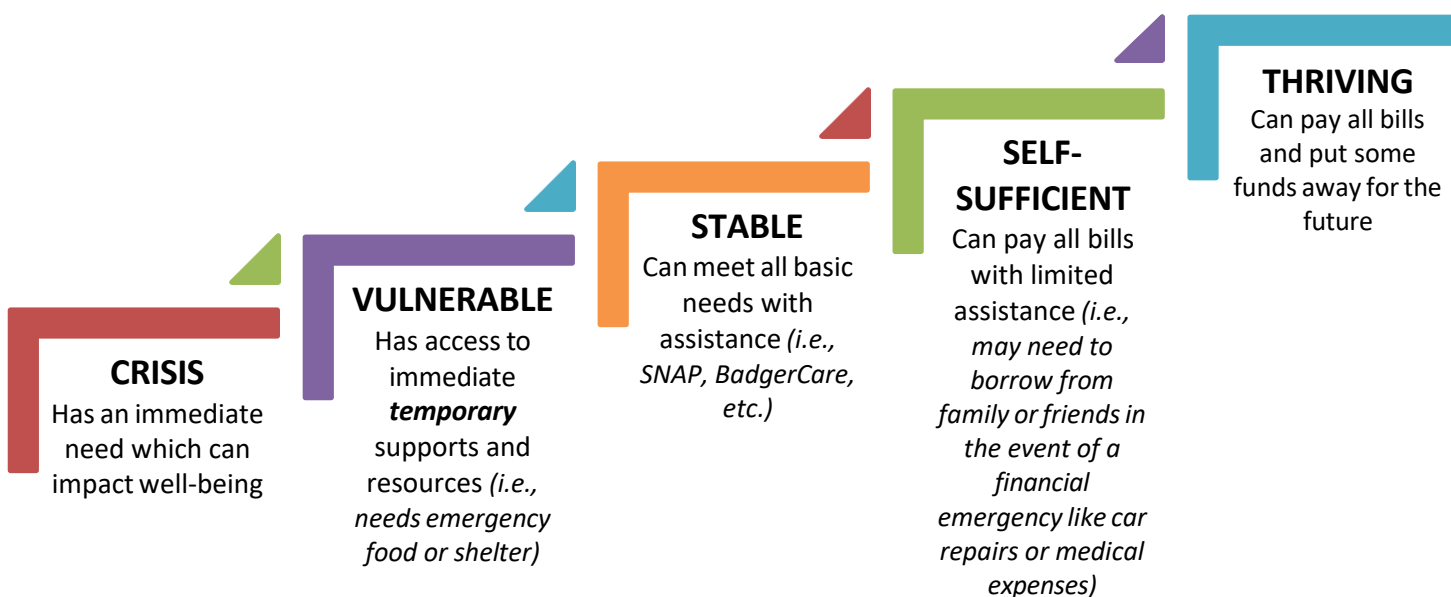
## When to assess?

At a minimum, it is important to assess upon intake (*program entry*) and at program exit. For longer term case management work, it can be helpful to reassess every 3-6 months. United Way of Marathon County will request data reporting at mid-year and end of year, so you will want to factor that into your assessment schedule. If a client leaves without an exit assessment, the staff member may complete the final matrix based on their knowledge of the client, if sufficient to provide an accurate assessment.

## What happens to the results?

United Way of Marathon County has a data management system in place (Foundant) to collect and report on this data. Your organization will be asked to keep de-identified assessment information to ensure you have proper information readily available when it comes time to report that information in the system.

## THE ROADMAP FROM CRISIS TO THRIVING



# Individual Category & Questions

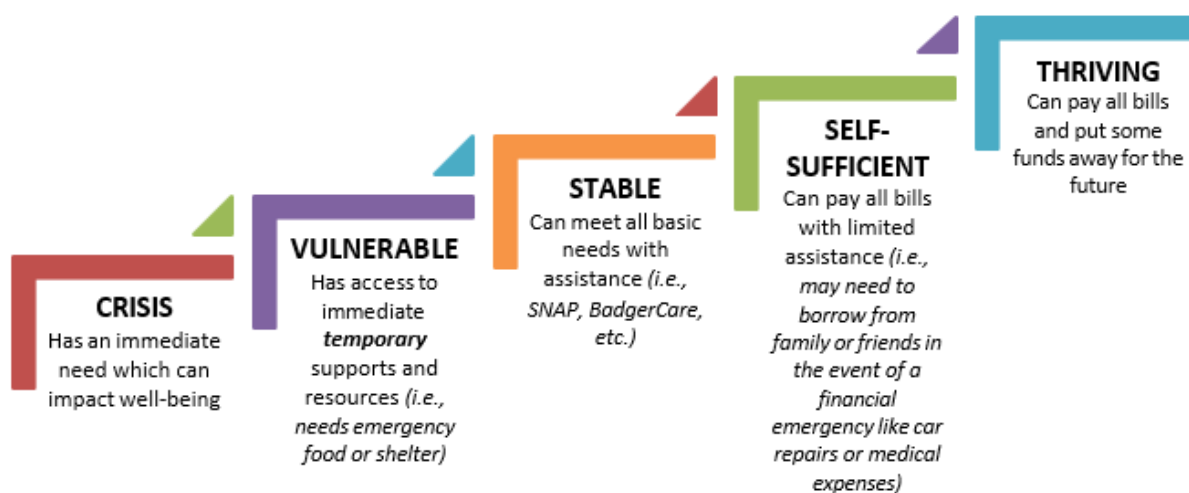
## A: Basic Needs

### 1. Food

#### Suggested questions for guiding assessment:

- Are you currently able to access food for you and/or your family?
- Do you receive food assistance/benefits (*SNAP, Basic Food, EBT; formerly known as "food stamps"*) or other food resources (*food pantries*)?
- Are you able to afford to buy the foods that you would like? (*ex: healthy, fresh food*)
- What is your current living situation?

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
No food or means to prepare it; relies to a <b>significant</b> degree on other sources of free or low-cost food; no access to healthy, fresh food (lives in food desert; no transportation options)	Majority of household food is purchased with food assistance (SNAP); household relies <b>significantly</b> on other sources of free or low-cost food; limited access to healthy, fresh food (lives in food desert; limited transportation options)	Can usually meet basic food needs, but requires <b>occasional</b> assistance from a supplemental food program (food stamps/food pantries); some access to healthy, fresh food	Can meet basic food needs without assistance; able to access healthy, fresh food	Always able to purchase and prepare healthy, fresh food of choice



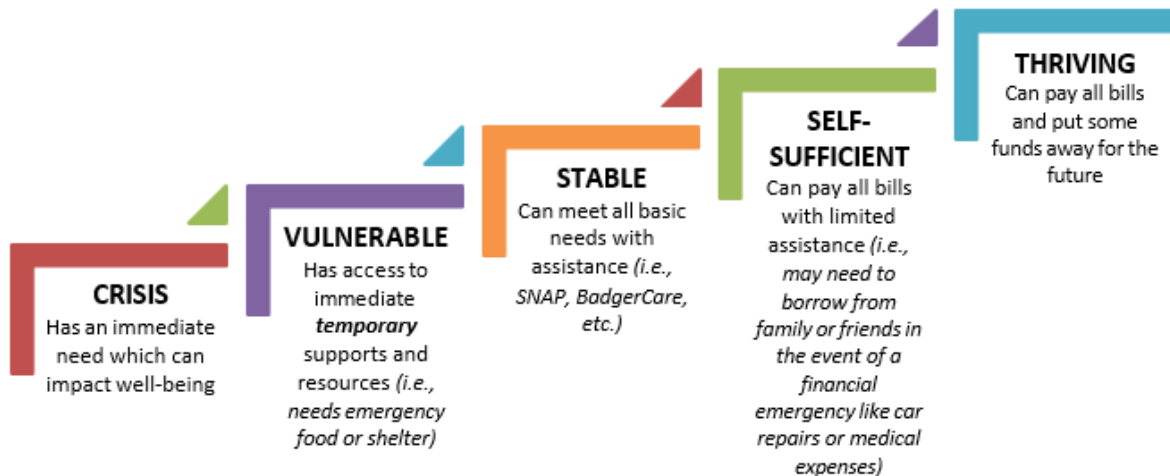
# Individual Category & Questions

## 2: Housing

### Suggested questions for guiding assessment:

- What is your current living situation?
- Are you facing eviction or foreclosure?
- If you are not receiving assistance, how much is your monthly rent amount/mortgage payment, and how much is your net (*after taxes*) monthly income?
- Do you feel you can afford to live in a neighborhood of your choice?
- Is your current income covering costs for your basic needs (*food, clothing, housing, utilities, transportation, etc.*)?

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
Currently <b>homeless</b> or facing eviction/foreclosure; has an eviction notice	At risk of losing housing; residing in <b>temporary housing</b> (shelter or motel); has difficulty qualifying for housing; <b>doubled up</b> with others; is 41% or more of monthly net income	Has stable housing for at least 6 months (subsidized or unsubsidized); residing in <b>transitional housing</b> ; rent is 36-40% of monthly net income	Secure homeownership OR renting private housing with limitations of choice due to moderate income AND/OR monthly rent is 31-35% of monthly net income	Homeownership or renting private housing in a neighborhood of choice AND/OR rent is 30% or below of monthly net income



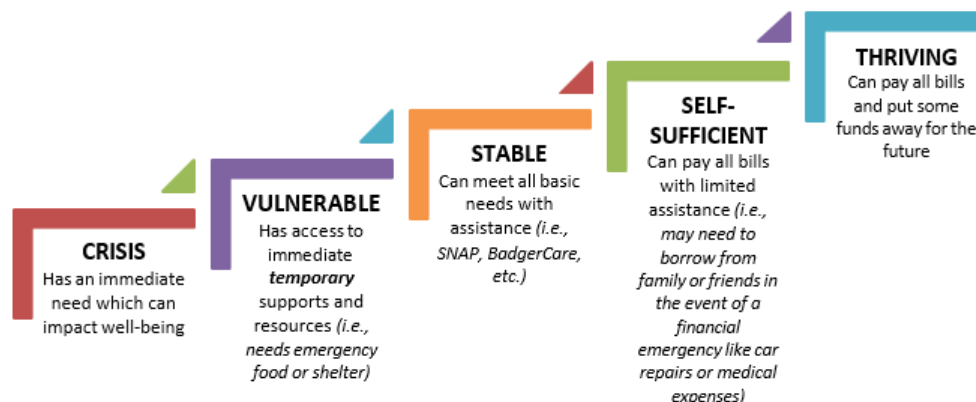
# Individual Category & Questions

## B: EMPLOYMENT & INCOME

### Suggested questions for guiding assessment:

- Are you currently employed?
- Do you have income?
- Is your employment situation temporary, seasonal or permanent?
- How many hours per week do you work on average?
- Are you working the number of hours you desire or need to work?
- Does your employment situation provide adequate pay (*see definitions below*)?
- Does your employer provide benefits for you? For your family? Examples of benefits:
  - Medical/mental/dental insurance
  - Vision benefit
  - Paid vacation/holiday/sick time or PTO (*paid time off*)
- Is your current income covering costs for your basic needs (*food, clothing, housing, utilities, transportation, etc.*)?
- Does your income allow you to meet your basic needs and pay all of your bills (*including utilities, phone, credit cards, restitution, loans, childcare, etc.*)?
- Do you have a savings account? If yes, how many months of expenses are covered?
- Does your income allow you to make non-essential purchases (*beyond basic needs and monthly bills*)?

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
No job; difficulty obtaining/maintaining employment	Temporary; part-time or seasonal; <b>inadequate</b> pay, no benefits; employed but wages/hours not adequate to meet basic needs	Employed full time; inadequate pay; few or no benefits; limited or no opportunity for advancement	Employed full time with adequate pay and benefits; advancement potential	Maintains <b>permanent employment</b> with adequate income and benefits



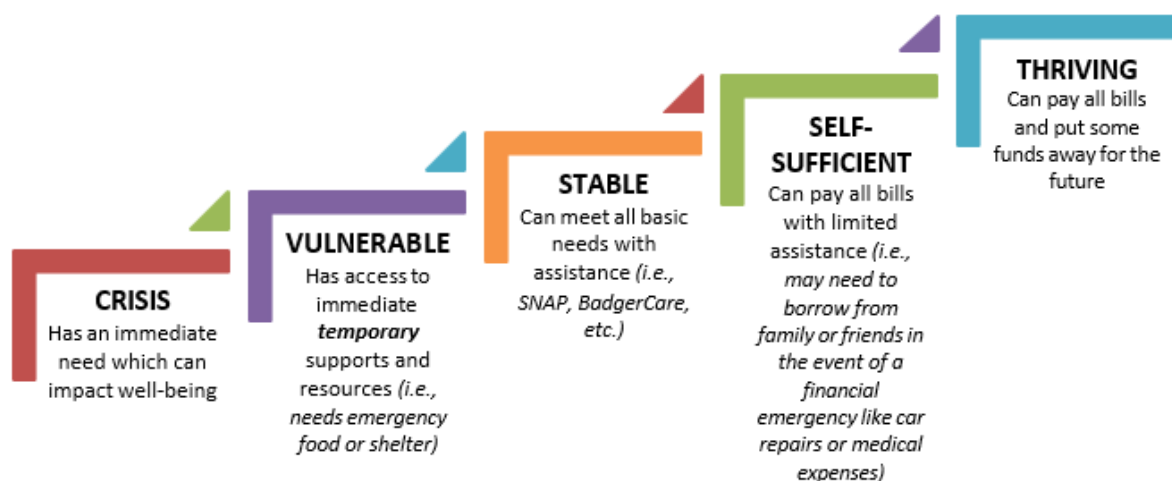
# Individual Category & Questions

## C: CHILDCARE

### Suggested questions for guiding assessment:

- Do you have children for whom you need childcare (*ages 0-11*)?
- Do you have childcare for your child(ren)?
  - If yes, is your childcare reliable?
  - Is it affordable?
  - Is it adequate (*see definitions below*)?
  - Does care provider offer supplemental learning activities/curriculum?
  - Are you able to select your childcare of choice?
- Do you have a backup childcare plan if you have problems with your current provider?

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
Needs childcare, but none is available, affordable, accessible and/or child is not eligible	Childcare is <b>unreliable</b> , <b>unaffordable</b> and/or <b>inadequate</b> ; barriers exist (i.e., eligibility, transportation, immunizations, paperwork, location, etc.) that prohibit access; supervision is a <b>problem</b> for childcare that is available	Affordable or subsidized childcare is available, but limited resources available to support narrow choices; accessing subsidies if qualified	Reliable, affordable childcare is available; no need for subsidies	Able to select quality childcare of choice; no need for subsidies; changes to childcare can be made when desired; backup childcare plan is developed





## D: BEHAVIORAL HEALTH

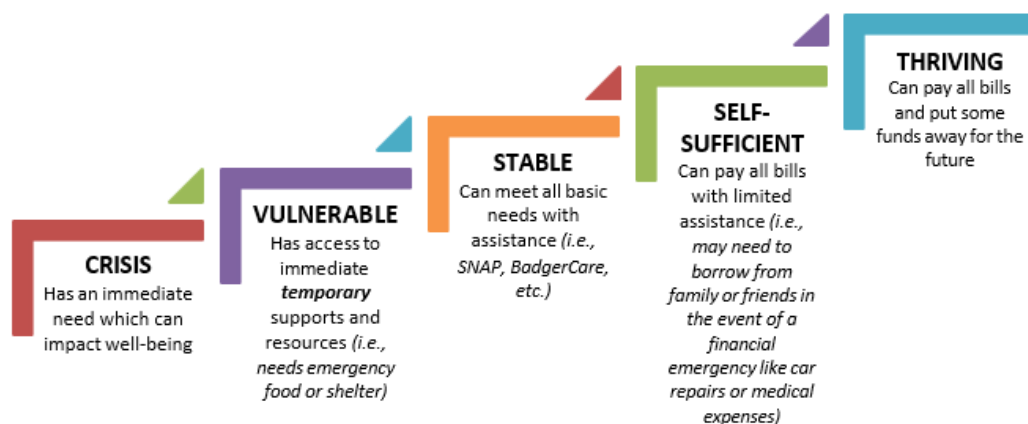
**What does this category measure?** Assesses the behavioral health needs of individual/household, including mental health treatment, counseling, substance abuse treatment, and the nature of the individuals' intimate relationships regarding overall safety and well-being.

### Suggested questions for guiding assessment:

- Is anyone in the household experiencing mental health challenges? If so, do these challenges impact normal day-to-day living?
- Do you know how to access mental health services in your community?
- Is anyone in the household struggling with emotional wellness and in need of counseling and support?
- Are you or any members of your household receiving assistance with substance abuse issues?
- Does anyone feel unsafe in your home?
- How often do you or someone in your home feel unsafe (*all, most or some of the time*)?
- Are you or someone in your home currently experiencing physical, emotional, psychological, or sexual abuse in your home?

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
Experiencing severe difficulty in day-to-day life due to mental health, emotional wellness and substance use disorder needs not being met.	Feels that mental health, emotional wellness and/or substance abuse symptoms may get in the way of daily living; not sure what to do or where to go for help	Identified mental health, emotional wellness and/or substance use disorder needs and working towards having need met; is accessing appropriate services	Mental health, emotional wellness and/or substance use disorder needs are being managed; only minimal symptoms in response to life stressors	Feels good about overall behavioral health – does not need assistance in this area; knows where to go for help if needed

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
Household is <b>unsafe</b> ; someone in household feels unsafe in home at all times	Household safety is in jeopardy; someone in household feels unsafe in home <b>most of the time</b>	Feels safe in household <b>some of the time</b>	Feels safe in household <b>most of the time</b>	Involved in intimate or personal relationships that are emotionally nurturing/supportive; household always feels safe



# Example of Process Flow (food insecurity)

On the scale of “crisis to thriving”, where would you identify yourself when it comes to ensuring you have the foods you need?

- If crisis or vulnerable, document and move on to category questions.
- If stable or above, document and move on to category questions.

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
No food or means to prepare it; relies to a <b>significant</b> degree on other sources of free or low-cost food; no access to healthy, fresh food (lives in food desert; no transportation options)	Majority of household food is purchased with food assistance (SNAP); household relies <b>significantly</b> on other sources of free or low-cost food; limited access to healthy, fresh food (lives in food desert; limited transportation options)	Can usually meet basic food needs, but requires <b>occasional</b> assistance from a supplemental food program (food stamps/food pantries); some access to healthy, fresh food	Can meet basic food needs without assistance; able to access healthy, fresh food	Always able to purchase and prepare healthy, fresh food of choice

## Category Questions: (required)

- Is your current income covering the costs of your housing?
- Does your current income allow you to pay all your bills?
  - If no, identify shortcomings and make referral.
- Do you have children?
  - If yes, do you have affordable & quality childcare?
- Is anyone in your household experiencing mental health issues?

**Note:** If a financial burden exists, but it is unclear which area it exists in, use the questions listed in this document to gather the information needed to make an appropriate referral.

## Documentation:

- If a referral was made, document and provide your service.
- If no referral was made and the individual notes that receiving this service helps them achieve financial stability, document as “achieving success.”
- If the individual is in crisis or vulnerable, follow up in their next few visits or 90 days, whichever comes first.
  - **90 day follow up with any individual that identifies as crisis or vulnerable is required.**

# Scenarios

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John has an unexpected financial emergency, which puts him in a tough spot for the month. Because of this emergency, it's realistic that he will fall behind trying to cover his household expenses. He makes the decision that he could cover his monthly bills if he could cover the cost of food in his household for the month.

John walks into the Neighbors Place and is greeted by their intake specialists. He explains his situation, is screened for his income, and meets the requirements of receiving help. Before he receives food the following conversation takes place:

Intake Specialist: *On the scale of “crisis to thriving”, where would you identify yourself when it comes to ensuring you have the foods you need?*

John: For this month I'd consider myself in crisis. I have no money for food and will depend 100% on anything I can get.

Intake Specialist: *Okay. I completely understand. I do have a just a few more questions for you and then we can get you shopping in the market.*

- *Is your current income covering the costs of your housing?*
  - **John: Yes. I was able to pay my rent.**
- *Does your current income allow you to pay all your bills?*
  - **John: Yes, in situations where I don't have these unexpected expenses.**
- *Do you have children?*
  - **John: Yes.**
    - *Intake Specialist: Do you have affordable & quality childcare*
  - **John: Yes**
- *Is anyone in your household experiencing mental health issues?*
  - **John: Not that I'm aware of.**

*Excellent! Thanks for those responses. Let's connect you with a personal shopper and get you on your way.*

## Documentation:



This individual is considered financially stable because they have received this service.

# Scenarios

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John: For this month I'd consider myself in crisis. I have no money for food and will depend 100% on anything I can get.

Intake Specialist: *Okay. I completely understand. I do have just a few more questions for you and then we can get you shopping in the market.*

- *Is your current income covering the costs of your housing?*
  - **John: Not this month. If there is a way to help with that I'd take anything I can get.**
- *Ok. Does your current income allow you to pay all your other bills?*
  - **John: Yes, in situations where I don't have these unexpected expenses.**
- *Do you have children?*
  - **John: Yes.**
    - *Intake Specialist: Do you have affordable & quality childcare*
  - **John: Yes**
- *Is anyone in your household experiencing mental health issues?*
  - **John: Not that I'm aware of.**

*Excellent! Thanks for those responses. Because you did indicate you needed some assistance with rent, here is the contact information for Northcentral Community Action program. I'd recommend contacting them and seeing if you are eligible for rental assistance this month. If you'd like, after your shopping, I can walk you down to their offices.*

*First, let's connect you with a personal shopper and then we can get you over to NCCAP.*

**Documentation:** This individual is **NOT** considered financially stable because a referral was made. Document the services provided and that they were referred.



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# Quick look Referral Guide

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## Food

- Aging and Disability Resource Center of Central WI – Meals on Wheels
- The Neighbors Place
- Faith In Action
- Wausau Mobile Meals
- Progress Athens – Athens Caring Circle pantry
- HOLA, Inc – Abbotsford Food Pantry
- Community Center of Hope

## Housing

- Northcentral Community Action Program
- The Women's Community – Transitional Living
- WI Judicare

## Employment & Income

- WI Judicare
- St. Vincent de Paul – Getting Ahead
- ECDC-Multicultural Community Center
- Girl Scouts of the Northwestern Great Lakes

## Childcare

- Childcaring – Good Start Grants
- The Boys & Girls Club
- Spencer Kids Group
- Woodson YMCA

## Physical Health

- Wausau Free Clinic

## Behavioral Health

- Mental health
  - Bridge Community Clinic – Mental Health and SUD Treatment Services
  - Marathon County School Based Consortium
  - Big Brothers, Big Sisters
  - Children's WI
  - Healthfirst
- Safety
  - The Women's Community
    - Domestic Abuse Services
    - Sexual Assault Victim Services

\*\* For more detailed information, please visit United Way's 211 at <https://www.unitedwaymc.org/211>.