

# SELF-SUFFICIENCY & WELL-BEING MATRIX

Adapted from the Arizona Self-Sufficiency Matrix and the Boulder County  
Self-Sufficiency Matrix – V 3.0

June 2017

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# Self-Sufficiency & Well-Being Matrix

## Why Focus on Self-Sufficiency?

Merriam-Webster defines 'self-sufficiency' as..."able to live or function without help or support from others".

Dr. Diana Pearce, founder & director of the Center for Women's Welfare at University of Washington's School of Social Work explains 'self-sufficiency' as a geographic-specific yardstick for how much is enough to live on while remaining independent of public or private assistance.

## ALICE (Asset Limited, Income Constrained, Employed)

With the cost of living higher than what most wages pay, ALICE families work hard and earn above the Federal Poverty Level (FPL), but do not earn enough to afford a basic household budget consisting of housing, child care, food, transportation and health care. In Pierce County 22% of households fall into the category of ALICE, while another 12% of Pierce County households live in poverty, meaning that more than 1 in 3 households are struggling to meet basic needs.

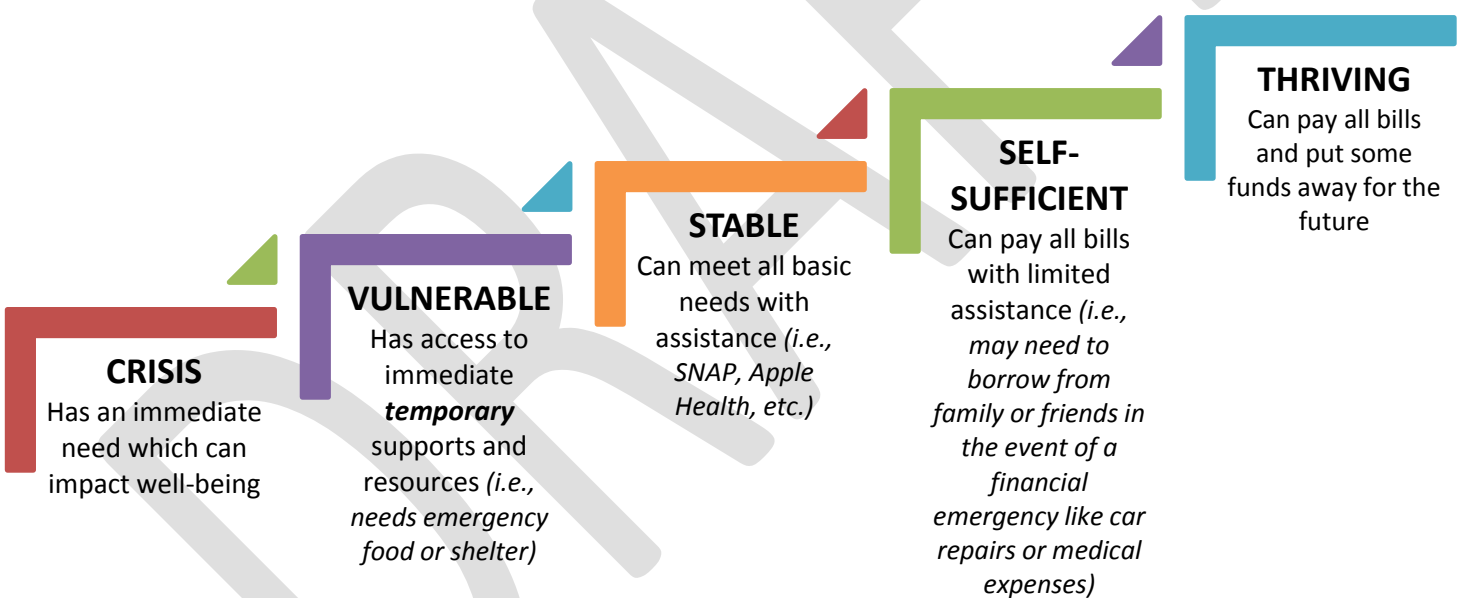
**Here are just a few examples of how being ALICE impacts households:**

Challenge	Impact on Household
Has to live in substandard housing and/or housing far away from job because of high housing costs	<ul style="list-style-type: none"><li>• Increased stress on entire household</li><li>• Health/safety risks</li><li>• Increased maintenance costs</li><li>• Longer commute or transportation challenges</li><li>• Less time for other activities (<i>like school/homework involvement, etc.</i>)</li></ul>
Has substandard or no child care	<ul style="list-style-type: none"><li>• Increased stress on entire household</li><li>• Health/safety risks</li><li>• Limited employment opportunities (<i>i.e., one parent cannot work because needs to be home with child</i>)</li><li>• Learning risks for children limiting their success in life</li></ul>
Has no car	<ul style="list-style-type: none"><li>• Increased stress on entire household</li><li>• Limited employment opportunities (<i>dependent on where public transportation goes or close to home if no public transportation</i>)</li><li>• Long commute leaving less time for other activities (<i>like job training, children, etc.</i>)</li></ul>
Does not have enough healthy food	<ul style="list-style-type: none"><li>• Increased stress on entire household</li><li>• Poor health, can result in illness which could result in time off from work or job loss</li><li>• Children suffer from poor health; difficulty concentrating in school limiting their potential for success in school/life</li></ul>

## Introduction

United Way of Pierce County's goal is to break the cycle of poverty which means ensuring all individuals and families are not just self-sufficient but can also thrive! By working with our community partners to identify those who are struggling throughout the three initiative areas, as a collective network we will be able to move more households towards self-sufficiency resulting in a more resilient community where people are prepared to weather the inevitable challenges and emergencies in life. United Way of Pierce County hopes to bring together nonprofits, funders and community leaders interested in developing a common local understanding of what self-sufficiency looks like for Pierce County residents and explore how it pertains to the provision of services in our community. Self-sufficiency is more than an economic assessment of a family's situation, so we must attempt to incorporate less quantifiable aspects of well-being in life, including education, housing stability, life skills, mental health, safety, parenting, child development, etc.

## THE ROADMAP FROM CRISIS TO SELF-SUFFICIENCY



## How does one measure or assess self-sufficiency?

A self-sufficiency 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 self-sufficiency. 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 – 6 months, 12 months, final exit, follow up, etc.*).

The matrix can be used in a variety of situations:

- As a case management tool to document client progress toward self-sufficiency
- As a self-assessment tool for individuals who wish to determine their own strengths and areas for improvement
- As a program management tool for organizations to assess the effectiveness of services being offered and how to direct resources
- As a measurement tool for grant makers to clearly articulate their funding priorities, and as a communication tool for demonstrating the success of local programs, as well as sharing information about community conditions with the general public, stakeholders and policymakers

In this document, we are introducing a ***draft*** of United Way of Pierce County's Self-Sufficiency & Well-Being Matrix, so you may become familiar with the assessment tool, the definitions of the components of the assessment, and the process for implementation and use. **The Self-Sufficiency & Well-Being Matrix is flexible and should be adapted to meet the needs and core purpose of individual organizations and programs. It is recommended that each program identify three to five scales to use as a foundation for measuring client progress towards specific outcomes.** When determining which outcome scales best fit your organization, think about your organization's core purpose, philosophy and strategies.

# Welcome to “The Matrix”!

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To employ a movie analogy, we have reached a point similar to that crucial moment from the movie “The Matrix” where Morpheus has posed the life-changing question to Neo...”Take the blue pill – the story ends (*his current reality continues*).” You take the red pill – and you have the opportunity to build and shape the new reality.

As a community, we can continue to go on about our business (*blue pill approach*), providing valuable services and resources to individuals and families independently and reporting on those outputs individually – OR – we can join together to develop a systemic (*red pill*) approach where we do more than meet just an individual need, but rather we solve for the immediate need while providing additional services and referrals that will move the household further along the continuum of self-sufficiency than providing a single service alone can. By getting to know and understand those being served through the use of a common assessment tool, we are able to better support them in their journey from crisis...to stability...to thriving. This is how we break the cycle of intergenerational poverty in our community, by working together to move families toward self-sufficiency and general well-being.

The following pages will provide explanations of what each category measures, suggested guiding questions to walk staff through the scoring of each category, and definitions to help ensure correct and consistent scoring across various programs.



## Here are some important factors to keep in mind while working with this tool:

### 1. Guiding Questions and Definitions

Each category in this document is accompanied by suggestions for questions to guide the assessment and definitions to assist in determining where the household lands on the self-sufficiency continuum. The goal is to ensure consistent and accurate scoring across households, across staff team and across various programs within an organization and/or within the community.

### 2. Focus on One Category at a Time

When assessing a household, it is imperative that the staff person focuses on ONE CATEGORY at a time. Although some categories may overlap and/or influence each other, staff should look at the household through the lens of just the category they are currently evaluating. For example, if scoring the household's food category, the staff member should not allow the household's housing situation to influence the food category.

### 3. Household vs. Individual

Staff using the assessment must look at each category from a household perspective. When working with a category where the individual adults in the household have different situations, please score the category with respect to the individual with the highest need.

#### 4. Frequency of Assessments

Staff using the assessment should assess households with the following frequency:

- At intake (*program entry*)
- Every 90 days thereafter (*for ongoing case management services; dosage of at least one visit per month for at least 90 days*)
- At program exit

#### 5. Not Applicable vs. Not Enough Information at this Time

All of the individual categories provide an option for **“not enough information at this time”** and a few of the domains have an option of **“not applicable”**. When working with households, especially when you are meeting them for the first few times, you may not have enough information to assess them in various areas (*i.e., Parenting Skills or Substance Abuse*). In this instance, categories may be scored as **“not enough information at this time”**. Once you have enough information, that score will change to an actual score during a follow-up assessment.

**“Not applicable”** means that the category will likely not be applicable for the duration of your work with the household (*i.e., Parenting Skills would be “not applicable” for a household with no children*).

**Not enough information at this time** should change from initial assessment to subsequent assessments; whereas, **not applicable** should remain the same over time.



# Individual Category Descriptions & Questions

## Mandatory Assessment Areas for 2017-19 Investment Cycle

### Category: FOOD

**What does this category measure?** Assesses the household's ability to obtain and prepare appropriate food, both in terms of knowledge about how to access food and financial resources to purchase food.

#### Suggested questions for guiding assessment:

- Are you currently able to access food for you and/or your family?
- Where do you get most of the food that you and/or your family eat on a daily basis?
- 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 meet your basic food needs without food benefits?
- Are you able to meet your basic food needs without a food pantry, meal site or family assistance?
- Are you able to afford to buy the foods that you would like?
- Do you have access to healthy, fresh food (*lives close to grocery store or farmers market, has access to community or own garden, food pantry provides fresh produce and dairy*)?
- Do you know how to prepare the food that you have (*possess basic cooking skills, understands how to use recipes, etc.*)?
- Do you have the tools needed to prepare the food you have (*i.e., working stove/oven, microwave, slow cooker, pots/pans, utensils, etc.*)?

#### Definitions:

- **Significant:** 75% of the time or more
- **Occasional:** 50% of the time or less

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: HOUSING

**What does this category measure?** Assesses the household's current housing situation.

**Suggested questions for guiding assessment:**

- What is your current living situation?
- Are you facing eviction or foreclosure?
- Is your home structurally safe and free of mold and any other infestations?
- Are you receiving any rental or mortgage assistance? If yes, how long will your assistance last?
- 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?

**Definitions:**

- **Homeless:** no secured place to sleep night after night
- **Temporary Housing:** Staying in a shelter (90 days or less secured housing) or motel
- **Doubled Up:** living with family, friends or other non-relatives due to economic hardship
- **Transitional Housing:** subsidized housing lasting up to 2 years

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

## Category: INCOME

**What does this category measure?** Assesses the income adequacy of the client to meet basic needs, as well as to save and potentially make some non-essential purchases.

### **Suggested questions for guiding assessment:**

- Do you have income?
- 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*)?

### **Definitions:**

- ***Inadequate***: current income is less than budgeted basic needs expenses
- ***Adequate***: current income meets current budgeted basic needs expenses
- ***Some savings***: 1-2 months of expenses in savings
- ***Substantive savings***: 3-6 months or more of living expenses

For a guideline on the self-sufficiency standard, go to

[http://www.uwpc.org/sites/uwpc.org/files/UW%20ALICE%20Report\\_PierceCounty.pdf](http://www.uwpc.org/sites/uwpc.org/files/UW%20ALICE%20Report_PierceCounty.pdf)

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
No income; basic needs not met	Income is <b><i>inadequate</i></b> for meeting basic needs	Income is <b><i>adequate</i></b> for meeting basic needs, but no savings or ability to handle financial emergencies	Income is sufficient and stable, adequate for paying monthly bills, provides for <b><i>some savings</i></b> and ability to purchase occasional non-essential items (saves 1-4% monthly)	Income is sufficient and stable, adequate for paying monthly bills and provides for <b><i>substantive savings</i></b> and ability to purchase non-essential purchases (saves 5% monthly)

# Initiative Area: Basic Needs – Crisis Services

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## Category: TRANSPORTATION

**What does this category measure?** Assesses whether or not the individual has appropriate, safe and reliable access to transportation (*whether by car, bus or reliance on friends/family*).

### **Suggested questions for guiding assessment:**

- Do you have access to transportation when you need it (*personal car, public transportation, regular ride from friends/family*)?
- If yes, how often is transportation available for you?
- Have you had difficulty getting transportation to work or other important appointments recently?
- How often do you or your family members have difficulty getting transportation when you need it?

### **Definitions:**

- ***Rarely:*** 1-4 days a month transportation is available
- ***Some:*** 2-4 days a week transportation is available
- ***Most:*** 5-7 days a week transportation is available

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
No access to transportation, public or private; may have car that is inoperable	<b><i>Rarely</i></b> has transportation needs met; transportation is available, but unreliable, unpredictable, unaffordable; may have car but no insurance, license, etc.	Has transportation needs met <b><i>some</i></b> of the time; transportation is available and reliable, but limited and/or inconvenient; drivers are licensed and minimally insured	Has transportation needs met <b><i>most</i></b> of the time; transportation is generally accessible to meet basic travel needs	Transportation is readily available and affordable; car is adequately insured

## Category: CLOTHING

**What does this category measure?** Assesses the client's ability to obtain appropriate clothing, both in terms of knowledge about how to access clothing and financial resources to purchase clothing if necessary.

**Suggested questions for guiding assessment:**

- Does your family have enough clothing for current and upcoming seasons?
- Do you have the right sizes of clothing?
- Does your family have enough clothing for school/work?

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
No clothing or seriously inadequate clothing ( <i>i.e., no coat in winter</i> ); insufficient clothing to assure clean clothes on a daily basis; unaware of resources for clothing; no access to laundry resources	Unable to buy appropriate clothing; relies on clothing resources or thrift stores; clothing may not be suitable for the season; may lack access to laundry resources	Occasionally relies on thrift stores or community clothing banks; has limited financial resources to obtain clothing; has access to laundry resources	Has financial resources to purchase appropriate (adequate for season, correct size, etc.) clothing for school or work	Is able to purchase clothing of choice to assure appropriate attire for school or work

# Initiative Area: Basic Needs – Breaking Down Barriers

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## Category: PHYSICAL/DENTAL HEALTH

**What does this category measure?** Assesses need for physical and/or dental health care, as well as access to health care and medical insurance coverage for all family members.

### **Suggested questions for guiding assessment:**

- Do you and everyone in your family have health insurance coverage?
- Are you or a household member currently dealing with untreated, chronic or life threatening physical health challenges?
  - If so, are you or a household member currently receiving the health care services that you need to treat and deal with these challenges?
  - Have you or a household member seen a doctor to discuss your current health challenges?
- Do you know how to access medical/physical health care services in your community?
- Do you or a household member receive preventative care from both a doctor and a dentist?
- Do you or anyone in your family have immediate physical or dental health problems or concerns?
- Are you able to access medical care when needed?

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
No medical coverage and immediate need for medical/dental care exists for any member of the household; chronic medical conditions with inconsistent follow-up care	No medical coverage and great difficulty accessing medical/dental care when needed; chronic medical conditions with inconsistent follow-up care	Some family members (i.e., children) have medical coverage but adults lack coverage; attempts to make and keep routine medical and dental appointments	All family members have medical coverage and can access care when needed, but costs may strain budget; no or stable chronic conditions; employs preventative medical/dental practices	All members are covered by affordable, adequate medical, vision and dental health care coverage and can access care when needed; proactive preventative medical/dental practices

## Category: MENTAL HEALTH

**What does this category measure?** Assesses the mental health needs of individual/household.

**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?
- Is anyone currently receiving mental health services?
- Do you know how to access mental health services in your community?

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
Experiencing severe difficulty in day-to-day life due to mental health needs not being met; doesn't know where to go to get help; in crisis – danger to self or others	Feels that mental health symptoms may get in the way of daily living; not sure what to do or where to go for help; could benefit from mental health services	Identified mental health needs and working towards having need met; is accessing appropriate services	Mental health needs are being managed; only minimal symptoms in response to life stressors	Feels good about mental health – does not need assistance in this area; knows where to go for help if needed

## Category: SUBSTANCE ABUSE

**What does this category measure?** Assesses whether or not anyone in the household is using alcohol and/or prescription drugs in an inappropriate manner. Any use of illicit drugs are considered in-crisis and unsafe.

**Suggested questions for guiding assessment:**

- Do you or any members of your household have issues with substance abuse?
  - For example, has anyone missed a family event or work commitment because of drinking or using drugs?
- Are you or any members of your household receiving assistance with substance abuse issues?
- Does anyone in your household have a history of substance abuse?
- Do you know what resources are available in your community to help you deal with alcohol and/or drug abuse?

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
Severe alcohol abuse and/or chemical dependence; institutional living or hospitalization may be necessary; help not sought	Significant abuse of substances resulting in chronic family/work difficulties	Occasional abuse of substances; usage of chemicals has a tendency to lead to an abuse pattern, resulting in negative consequences; currently participating in substance abuse services	Occasional misuse of alcohol and/or prescription drugs, generally uses in an appropriate manner	No drug use; uses alcohol and prescription drugs in an appropriate manner (minimal to no usage)

## Category: ENGLISH LANGUAGE SKILLS

**What does this category measure?** Assesses the English speaking ability of clients for whom English is a second language

**Suggested questions for guiding assessment:**

- Does client rely on friend or family member for help in understand and communicating in English?
- Is client able to understand and communicate with some basic English?
- Is the client experiencing challenges in day-to-day situations because of limited English skills (*i.e., language is a barrier to employment or assisting child with school*)?

**Definitions:**

- **Survival English** is a term used to refer to the essential English someone needs to know in order to survive – live or work – in an English speaking environment

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
Does not speak English; no access to family or friends as interpreters	Speaks <b>survival English</b> ; limited access to family or friends as interpreters	Speaks conversational English; limited reading and writing of English; access to interpreters as needed	Reads, writes and speaks English sufficiently to navigate most day-to-day situations	Able to read, write and speak English proficiently; easily navigates day-to-day situations



## Category: FUNCTIONAL ABILITY

**What does this category measure?** Assesses whether or not an individual is able to perform Activities of Daily Living (ADLs) – see definition below – necessary for independent living. Also assess whether inability to perform ADLs creates barriers for the household to be self-sufficient.

### **Suggested questions for guiding assessment:**

- Is the client able to perform all the ADLs for self or with assistance (*see definition below*)?
- If no, does client have the assistance needed in his/her home?
- Is that assistance provided by someone else in the household?
- Does being a caregiver create a barrier to self-sufficiency because it impedes that person's ability to work outside the home and earn income?

### **Definitions:**

- ***Activities of Daily Living (ADLs):*** daily self-care activities, basic ADLs include:
  - Getting dressed
  - Basic housekeeping
  - Personal hygiene
  - Food prep and eating
  - Proper use of medicine
  - Use of telephone or other forms of communication

If no one in the household has functional limitations, use N/A for this category.

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
Because of functional disabilities individual is unable to live alone without assistance; assistance is not available or relies completely on another household member for care	Because of functional disabilities, individual requires moderate assistance or supervision; assistance is not available or relies heavily on another household member for care	Not able to perform ADLs but is in a safe and supportive environment OR requires extensive or total assistance and assistance is available without relying completely on another household member	Fully able to perform most ADLs, or with limited assistance/support; support and assistance is available	Fully able to perform all ADLs without assistance or support

## Category: RELATIONSHIP SAFETY

**What does this category measure?** Assesses the nature of the individual's intimate relationships with regard to overall safety and well-being. This category assesses for abuse by an intimate partner and abuse perpetrated by family members or individuals with access to household members.

### **Suggested questions for guiding assessment:**

- Does someone 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 or psychological abuse in your home?

### **Definitions:**

- ***Unsafe:*** current verbal, physical, psychological or emotional abuse in the home
- ***Most of the time:*** approximately 75% of the time
- ***Some of the time:*** approximately 50% of the time

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

## Category: LEGAL - CIVIL

**What does this category measure?** Assesses whether or not the client has any pressing legal (*non-criminal*) issues and, if so, whether or not they have the knowledge, skills and resources to work towards getting the issues resolved.

### **Suggested questions for guiding assessment:**

- Do you have any issues that may require a lawyer to resolve (*divorce, discrimination, child support, etc.*)
- Do you currently have legal representation for any issues?
- Are you getting the help that you need to deal with those legal problems?
  - If not, do you know where to get legal help in your community?

### **Definitions:**

- ***Examples of legal issues:***
  - Divorce or separation
  - Allocation of parental responsibility (*child custody*)
  - Civil court (*being sued/garnishments, etc.*)
  - Juvenile court/delinquency/truancy
  - Dependency & neglect actions
  - Issues of citizenship and legal status
  - ***NOTE: If client is or is supposed to be receiving child support (payee), this is NOT a legal issue; if, however, the client is supposed to be paying child support (payor), but is not, this WOULD be a legal issue***

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
Has significant legal problems and is not addressing them or does not understand that the problem involves legal issues	Has identified legal problems but is unable to proceed without legal assistance	Has responded to legal issues with appropriate legal assistance	Legal issues are moving towards resolution	No legal issues or legal issues have been fully resolved

## Category: Technology

**What does this category measure?** Assesses whether or not the client has reliable access to technology (*computer, tablet, smartphone, etc.*) and/or the internet.

**Suggested questions for guiding assessment:**

- Do you (or does your household) have access to technology (computer, laptop, tablet/iPad, smartphone, etc.) at home?
  - If not, do you have reliable access to technology at another location (school, library, friend/family's house, etc.)?
- Do you (or does your household) have access to the internet at home?
  - If not, do you have a reliable place to access the internet (coffee shop, friend/family's house, community center, etc.)?

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
No access to technology or the internet	Has no technology; has limited access to the internet via another location (library computer, school, etc.)	Has access to technology but does not have reliable access to the internet (wifi)	Has at least one web-enabled device (smartphone, tablet, etc.) and some access to the internet at home (i.e., when I have data available on wireless plan)	Has access to web-enabled devices and internet at home

# Initiative Area: Strong Families

## Category: EMPLOYMENT

**What does this category measure?** Assesses the nature of the job or career in which the client is employed and considers the permanency and stability of the employment, as well as the benefits that accompany employment.

### **Suggested questions for guiding assessment:**

- Are you currently employed?
- 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*)
  - Life insurance
  - Pension/retirement/401K
  - Tuition reimbursement
- If employed, how long have you been working for your current employer?

### **Definitions:**

- ***Inadequate:*** unable to meet basic needs without assistance; below self-sufficiency standard
- ***Few or No Benefits:*** benefits are unavailable or unaffordable
- ***Permanent Employment:*** individual is in a position that is not temporary, term, probationary or time limited (i.e., seasonal)

***Disability:*** individual is receiving SSI/SSDI (use N/A for this category if individual is disabled)

***Age:*** individual is younger than 16 or older than 67 (use N/A for this category if individual is younger than 16 or older than 67)

For a guideline on the self-sufficiency standard, go to

[http://www.uwpc.org/sites/uwpc.org/files/UW%20ALICE%20Report\\_PierceCounty.pdf](http://www.uwpc.org/sites/uwpc.org/files/UW%20ALICE%20Report_PierceCounty.pdf)

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
No job; difficulty obtaining/maintaining employment	Temporary; part-time or seasonal; <b><i>inadequate</i></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><i>permanent employment</i></b> with adequate income and benefits

## Category: ADULT EDUCATION

**What does this category measure?** Assesses adult academic, institution-based achievements. The Workplace Skills category reflects some of the less structured skills that are important to career development.

### **Suggested questions for guiding assessment:**

- What is the highest level of education that you have completed?
- What degrees, professional certificates or professional trainings have you obtained?
- If you did not graduate from high school, do you have a GED?
- Are you able to read, write and perform basic math skills?
- If English is not your first language, are you able to use English in a functional capacity, or are you enrolled in ESL classes?
- Are you currently enrolled in educational classes or programs? If so, for what?

### **Definitions:**

- **Age:** individual is younger than 16 or older than 67 (*use N/A for this category if individual is younger than 16*)

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
No GED or high school diploma; does not have reading, writing, math skills; not enrolled in literacy, high school or GED program	No HS diploma or GED, but has basic reading, writing, math skills; is enrolled in literacy and/or GED/High school program	Has HS diploma or GED; functional reading, writing and/or math skills; has basic use of English and/or is enrolled in ESL program if applicable	Enrolled in post high school vocational education, technical or professional training, or some college credits	Post-secondary education or specialized training (certificate program, associates, bachelors, masters, doctorate)

## Category: **WORKPLACE SKILLS**

**What does this category measure?** Assesses the skills and abilities a client has for achieving and sustaining a career given the changing dynamics of the workforce.

**Suggested questions for guiding assessment:**

- Have you had a job in the past?
- Have you had difficulty keeping a job? If yes, how often did you change jobs?
- Have you ever quit a job with no future job lined up? If yes, how often?
- Are you able to provide positive references to prospective employers?
- Have you ever worked at the same job for longer than a year? If yes, for how long?

**Definitions:**

- **Negative:** history of being fired, quitting with no plan for next job, no positive references
- **Limited or Inconsistent:** work history of less than 1 year with no path for advancement and does not meet family needs OR movement from position to position without increased family stability/benefit OR movement from position to position with gaps of more than 14 days between positions
- **Established:** documented work history with positive references for future employment and demonstrable job skills associated with these positions

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
<b>Negative</b> or no work history; unable to obtain and retain employment in any industry	<b>Limited or inconsistent</b> work history of less than one year	<b>Established</b> work history of 1 - 2 years and has some skills that offer potential for obtaining a comparable position	<b>Established</b> work history of 2 - 5 years and skills that offer potential for obtaining a comparable position with opportunity for advancement in stable industry	<b>Established</b> work history of 5+ years at a single place of employment or in a single occupation; skills that offer great potential for obtaining better or comparable position in growing industry

## Category: MONEY MANAGEMENT

**What does this category measure?** Assesses the household's ability to manage their finances.

### **Suggested questions for guiding assessment:**

- Budget
  - Do you know how to use a budget and use it on a regular basis?
  - Do you know whether or not you have a monthly deficit or surplus?
  - Are you able to track your expenses?
  - Can you prioritize your expenses?
- Organization and Record Keeping
  - Do you organize your bills and other financial paperwork?
  - Are you able to pay bills on time?
- Debt Management
  - Do you feel you understand your debts and have control over them?
  - Are you currently experiencing any garnishments?
- Savings
  - Do you have a savings or a checking account?
  - Are you able to save money? If yes, is it sporadically or on a consistent basis?

### **Definitions:**

- **Limited Knowledge:** may know about the different concepts listed above and/or is currently performing well in one of these areas
- **Solid Knowledge:** knows about each of the concepts listed above and is currently performing well in three of these areas
- **Comprehensive Knowledge:** knows about each of the concepts listed above and is currently performing well in all of these areas

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
No knowledge or implementation of money management skills; unaware of resources or supports	Has <b>limited knowledge</b> of budgeting and money management; may be aware of resources or supports; unprepared for any financial emergency	Understands importance of budgeting and money management; uses a monthly budget; unprepared for most financial emergencies	Able to save sporadically; <b>solid knowledge</b> and implementation of money management skills; may be unprepared for larger financial emergencies	Able to save consistently; <b>comprehensive knowledge</b> and full implementation of money management skills



# Initiative Area: Successful Kids

## Category: PARENT ENGAGEMENT: PRE-K

**What does this category measure?** Assesses both a parent's access to and use of information/knowledge about school readiness and engagement in preparing their child for school.

### **Suggested questions for guiding assessment:**

- What are you doing to prepare your child to start school?
- Do you know where/how to find resources to help you prepare your child for school?
- What do you think your child needs help with at this time regarding school readiness?

### **Definitions:**

- **Early learning enrichment activities:** participates in supplemental learning activities outside of the home designed to increase school readiness skills (*i.e., Play to Learn, story time at the library, Moms of Preschoolers group, etc.*)

If family does not have preschool-aged children, use N/A for this category.

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
I have no knowledge of school readiness as it pertains to my child (age 0-5 years); unaware of resources or supports	I am somewhat aware of the what is needed to prepare my child for school; may be aware of resources or supports	I know and understand the importance of my child being ready for school; knows how to access and use information about school readiness	I am taking some steps to help my child be ready for school; may participate in <b>early learning enrichment activities</b>	I am taking all age-appropriate steps toward preparing my child to start school

## Category: PARENT ENGAGEMENT: SCHOOL-AGE

**What does this category measure?** Assesses both a parent's access to and use of school and educational resources and engagement in helping their child succeed in school.

### **Suggested questions for guiding assessment:**

- Are you using any school/educational resources at this time?
- Do you find it difficult to access school/educational resources to help your child?
- What do you think your child needs help with at this time to be successful in school?

If family does not have school-aged children, use N/A for this category.

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
My family is unable to access educational resources; I do not talk with my child about school and/or help with homework	My family has difficulty accessing or using educational resources; I rarely talk with my child about school and/or help with homework	My family has the ability to access educational resources; sometimes I talk with my child about school and/or help with homework	My family sometimes uses resources and supports; I often talk with my child about school and/or help with homework	My family does not need – or uses as needed – resources and supports; I always talk with my child about school and help with homework

## Category: **CHILDCARE**

**What does this category measure?** Assesses the family's ability to obtain appropriate childcare and after school care, both in terms of access to childcare and financial resources to pay for 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?

### **Definitions:**

- **Unreliable:** child care provider is not always available for pre-arranged care
- **Unaffordable:** family cannot afford childcare without sacrificing other basic needs even with subsidy (*if available*)
- **Inadequate:** childcare is not available in a location or at times that allow parent to fulfill other obligations
- **Problem:** provider to child ratio is too high, providers do not have adequate training, providers are not capable of meeting physical, emotional and/or mental needs of child

If household does not include children (*0-11 years*), use N/A for this category.

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

## Category: SCHOOL ATTENDANCE & BEHAVIOR

**What does this category measure?** Assesses both access to and engagement in educational institutions by any and all children in the family.

### Suggested questions for guiding assessment:

- Are all school-aged children currently enrolled in school?
- How often do any of your children miss school?
- How are your children currently performing in school?
- Do you know how to get information about the schools in your community?
- Do you know how to get support for behavioral issues at school?

### Definitions:

- **Often:** 3 or more times per month
- **Occasional:** 1-2 times per month
- **Excelling:** all school-age children excelling in school performance (proficient or better)

If family does not have school-aged children, use N/A for this category.

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
One or more school-aged children not enrolled in school	School-age children enrolled in school but <b>often</b> have truancy or behavioral issues OR not meeting academic expectations	Enrolled in school, but one or more children has <b>occasional</b> truancy or behavioral issues but is meeting academic expectations	Enrolled in school and attending classes most of the time AND reports no challenges with truancy or behavior AND is meeting academic expectations	All school-aged children enrolled and attending school on a regular basis; children are <b>excelling</b> in school performance (proficient or better)

# Individual & Family Well-Being

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## Category: LIFE SKILLS (Household Management)

**What does this category measure?** Assesses the client's ability to handle the day-to-day tasks associated with managing a household.

**Suggested questions for guiding assessment:**

- Are you able to keep your home clean and organized?
- Are you able to do laundry and have clean clothes available for your family members?
- Do you do the dishes after each meal and keep the kitchen clean?
- Do you regularly take out the trash and recycling?
- Are you able to plan and prepare meals on a regular basis?
- Are you able to replenish household supplies before you run out (*i.e., laundry detergent, toilet paper, etc.*)?
- Are you able to maintain the outside of your home, if required (*yard, sidewalks, etc.*)

**Definitions:**

- **Limited:** is usually able to accomplish 1-2 of the tasks listed above
- **Some:** is usually able to accomplish 3-4 of the tasks listed above

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
Unable to perform basic household tasks; home is dangerous, unsafe and/or unsanitary	Able to perform <b>limited</b> household tasks; home has areas that are unsafe and/or unsanitary	Able to perform <b>some</b> household tasks; home is generally safe and somewhat maintained	Can perform all basic household tasks; home is safe and maintained	Can perform all basic household tasks; home is safe, healthy and well-maintained

## Category: SUPPORT SYSTEM

**What does this category measure?** Assesses the nature of the client's immediate interpersonal relationships, especially the extent to which they form a foundation for the individual in times of crisis and need.

**Suggested questions for guiding assessment:**

- Do you have friends or family you can always rely on when in need of support? If yes, how many personal supports can you currently ask for help if needed?
- Are you aware of community resources that can help support you in a time of need? If yes, are you able to access them?
- Are you connected to or actively involved with groups in your community (*i.e., church, senior centers, schools and service groups*)?
- Do you feel that you are able to offer help and support to your own family and/or friends?

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
Has no personal support system and no knowledge of available community supports	Has no personal support system, but knows where to go in the community for help when experiencing a need or crisis	1-3 personal supports and basic community networks are available in times of need	3-5 personal supports available and is connected with at least one community support network ( <i>i.e., nonprofit, church, support group, etc.</i> )	Has 5 or more personal supports readily available and is able to give support in return; is active and/or highly knowledgeable about community support networks

## Category: EMOTIONAL WELL-BEING

**What does this category measure?** Assesses the client's emotional health and well-being

**Suggested questions for guiding assessment:**

- Do you ever have feelings of sadness or hopelessness?
- How do you feel about your current life situation?
- How does your perception about life and outlook affect your family (*i.e., unable to manage household tasks, short or impatient with family members, disinterested in daily activities, etc.*)?

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
I feel so hopeless about life that it affects my family	I often feel unhappy about life which can affect my family	Although I may have some disappointments, it does not interfere with my family	I am usually happy with my life situation	I am generally a happy person and resilient to life's challenges

## Category: RESILIENCE & COPING SKILLS

**What does this category measure?** Assesses the client's ability to cope and bounce back from challenges in life

**Suggested questions for guiding assessment:**

- Do you feel you are easily overwhelmed and stressed out?
- How do you perceive your ability to overcome challenges and difficult situations?
- How often do you feel like situations in your life are beyond your control?

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
I am unable to do basic tasks when I feel stressed or overwhelmed	When I feel stressed or overwhelmed, I have difficulty doing anything beyond basic tasks	When I feel overwhelmed or stressed, I am able to identify my strengths and/or utilize resources and supports that help me cope	Most of the time I feel like I have things under control and use my strengths to stay focused	I always feel like I have things under control and use my strengths and supports to navigate challenges

## Category: COMMUNICATION SKILLS

**What does this category measure?** Assesses the client's ability to communicate effectively with others in the household

**Suggested questions for guiding assessment:**

- Do you feel like you are able to communicate respectfully and openly with others in your household?
- How often do you feel heard and understood by others in your household?
- Are you interested in others in the household and seek to understand their point of view?

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
Communication among members of my household is often abusive or cut off	Communication among members of my household is strained and often disrespectful; does not listen or seek to understand others	I/We sometimes communicate respectfully with each other; sometimes listens and seeks to understand others	I/We usually communicate respectfully with each other; listen and seek to understand each other	I/We always communicate openly and respectfully; we are interested in each other and listen to understand

## Category: GOAL SETTING

**What does this category measure?** Assesses the client's ability to plan for the future by setting goals and making a plan for success

**Suggested questions for guiding assessment:**

- Are you able to visualize a better future for yourself in the near future (6 months, 12 months)?
- Do you currently have goals for the future?
- Are you more focused on getting through the day, week, month versus looking toward the future?
- Do you believe that setting goals increases your ability to make positive changes?

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
I am focused on basic survival; I cannot think about or plan for the future right now	I am focused on meeting my family's basic needs and reaching stability before looking to the future	I would like to focus on the future but do not have specific ideas for goals or a plan	I have some goals for the future and am making progress	I am clear about my goals and am able to make adjustments as needed to achieve success

# Parent & Child Well-Being

## Category: PARENTING

**What does this category measure?** Assesses the client's skills as a parent. Parenting skills can be assessed through self-report or direct observation.

### **Suggested questions for guiding assessment:**

- As the staff member working with this family, are you aware of any safety concerns regarding parenting skills?
- Are you recently a first-time parent (*within the last year*)?
- Are you familiar with child development concepts (*parent is a positive role model, maintains structure/routine for child(ren), is involved in child(ren)'s education*)?
- Have parenting skills classes ever been recommended to you? Do you believe you would benefit from attending such a class?

### **Definitions:**

- **Limited:** can manage child's behavior some of the time (*approx. 25%*); child may be in unsafe situations; reports or is observed to have frequent challenges which go unresolved or result in escalated behavior; requires additional education, resources and information to keep child(ren) safe and/or manage their behavior
- **Adequate:** can manage child's behavior most of the time; reports occasional challenges which go unresolved or result in escalated behavior; can benefit from additional education, resources and information to keep child(ren) safe and/or manage their behavior
- **Solid:** can manage child's behavior almost always; child has access to some supplemental enrichment opportunities
- **Optimal:** can manage child's behavior all of the time; child has ample supplemental enrichment opportunities

If household does not include children, use N/A for this category.

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
Current known or suspected safety concerns regarding parenting skills	New to parenting and/or has <b>limited</b> parenting skills. Is not familiar with child development concepts, may have unrealistic expectations; still developing parenting skills; could benefit from parenting classes	Parenting skills are <b>adequate</b> ; open to identified areas for growth; willing to take parenting classes	Parenting skills are <b>solid</b>	Parenting skills are <b>optimal</b> ; feels confident in knowledge about healthy/nurturing parenting



## Category: CHILD EMOTIONAL WELL-BEING

**What does this category measure?** Assesses the child's general mood and ability to recover when upset. Can be assessed through parent report or direct observation.

**Suggested questions for guiding assessment:**

- Do you feel your child is able to identify and communicate how he/she feels?
- Does your child recover quickly after being emotionally upset?
- Is your child generally positive/happy or negative/unhappy?
- How does your child react to conflict or challenges?

If household does not include children, use N/A for this category.

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
My child is negative and unhappy; is emotionally out of control; does not communicate emotions	My child's mood fluctuates but generally is negative/unhappy; difficulty recovering from emotional upset; has difficulty communicating emotions	My child's mood fluctuates but is usually positive/happy; can calm him/herself when upset; can name and communicate emotions when asked	My child is generally happy and positive; remains calm when faced with conflict or challenges; talks regularly about how he/she feels	My child is able to express and manage feelings effectively whether positive or negative

## Category: NURTURING

**What does this category measure?** Assesses the client's ability to respond to his/her child's emotional and physical needs in a positive, nurturing way.

**Suggested questions for guiding assessment:**

- Do you feel you are able to respond in a positive, nurturing way when your child is experiencing negative emotions (*i.e., sad, frustrated, scared, disappointed, etc.*)?
- Are you able to affirm your child is important to you through your actions (*i.e., hugs, words of encouragement, high-fives, listening to their problems and successes, etc.*)?

If household does not include children, use N/A for this category.

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
I am unable to support my child emotionally and/or physically	At times I have difficulty supporting my child emotionally and/or physically	I am learning to empathize with my child's emotional and physical needs	I usually respond to my child's emotional and physical needs with caring, love and concern	I always respond to my child's emotional and physical needs with caring, love and concern

## Category: FAMILY TIME

**What does this category measure?** Assesses the parent's ability to engage and spend quality time with their child(ren) beyond day-to-day care and school work.

**Suggested questions for guiding assessment:**

- Are you able to spend time sharing fun, positive activities with your child(ren) (*i.e., play board games, play outside, go for a walk, play with toys, etc.*)?
- How often are you able to enjoy fun time with your child?
  - At least weekly?
  - At least monthly?
  - Occasionally?
  - Never?

If household does not include children, use N/A for this category.

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
I am unable to spend time sharing fun, positive activities with my child(ren)	I have difficulty finding sufficient time to share fun, positive activities with my child(ren)	When I can, I try to spend some time sharing activities with my child(ren)	I sometimes spend time sharing fun, positive activities with my child(ren)	I intentionally plan time to share fun, positive activities with my child(ren) often

## Category: DISCIPLINE

**What does this category measure?** Assesses the parent's ability to set limits and use constructive discipline techniques effectively with child(ren).

**Suggested questions for guiding assessment:**

- Do you set clear limits and consequences for your child(ren)?
- Do you feel angry and frustrated frequently due to child behavior issues?
- Do you know where to go for support and resources regarding positive discipline techniques?
- Do you feel you are able to manage your child's negative behavior effectively?

If household does not include children, use N/A for this category.

Crisis (1)	Vulnerable (2)	Stable (3)	Self-Sufficiency (4)	Thriving (5)
I am angry and frustrated frequently because my child does not respond positively to my attempts to discipline; could benefit from parenting classes	I am often frustrated because my child does not respond positively to my efforts to discipline; may benefit from parenting resources/classes	My child sometimes responds positively to my efforts to discipline; may benefit from parenting resources	My child often responds positively to my efforts to discipline	I have effective strategies for discipline that my child respond to in a positive way

# Using the Matrix to Measure Client Progress

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The Self-Sufficiency & Well-Being Matrix is a measurement tool that captures, at a point in time, an individual's or household's position along the self-sufficiency continuum. It is a dialogue about where you are, where you want to be, and how you are going to get there.

- Categories are developmental on a 5-point scale.
- The matrix is designed for use with the client, which is why there are suggested questions to help facilitate assessment.

## Adapting the Matrix for Your Organization's Strategies & Programs

As a funded partner, organizations will be asked to participate in UWPC Initiative area learning communities, called Community Impact Partnerships, that will meet a few times each year to share learnings, best practices, ideas and innovations. The first meeting of the Partnerships in 2017 will be focused on determining a shared set of categories that all funded partners in a particular initiative area will include in their individual matrix format.

The Partnership group may determine that additional categories should be included. The group will be responsible for developing the characteristics for each level on the matrix, along with suggested questions and any necessary definitions.

The matrix is adaptable, to support improved reliability and gain ownership from end users. Your organization is, of course, welcome to track and report on categories beyond those decided upon by the Community Impact Partnership group. Our hope is that our funded partners will find value in the matrix as a tool to understand how their clients are doing overall and to help communicate the progress they make towards a state of well-being.

## 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. 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.

## How to assess?

- It is recommended that the matrix be completed jointly by client and case manager. It can be an excellent engagement tool for family-centered practice.
- Select one and only one status level in each category.
- If you and your client feel that the best score is somewhere between two numbers, score using the lower number

## What happens to the results?

United Way of Pierce County will have a data management system in place to collect and report out on this data. Your organization will be asked to keep de-identified assessment information (*we will only require the Unique Client ID # and DOB to track individuals*) in a spreadsheet format provided by UWPC that will be uploaded at mid-year and end of year intervals.