OVERVIEW

APPLICATIONS MUST BE COMPLETED AND SUBMITTED BY MIDNIGHT March 17, 2019. LATE AND/OR INCOMPLETE APPLICATIONS WILL BE DISQUALIFIED.
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Funding Announcement - Overview

Berkshire United Way (BUW) ignites the collective power of individuals and organizations to build a stronger community together.

Berkshire United Way is working toward achieving our mission by leading coalitions, funding evidence-based programs, and developing effective strategies that will create lasting change in our community. We consider our community level data in identifying the most pressing issues, research proven strategies that have measurable impact, then bring people and organizations together to collaborate on making positive progress in these areas.

BUW announces the availability of funding for the two-year period of July 1, 2019 – June 30, 2021. Successful applicants will receive an award for the period of July 1, 2019 through June 30, 2020 with continuation of funding for July 1, 2020 through June 30, 2021 contingent on satisfactory program performance, contract compliance, and available dollars. Any interested applicant must complete an Eligibility Form via: https://www.surveymonkey.com/r/EligibilityFeb2019

Investment will be based on the results of a competitive Request for Proposal (RFP) process where applicants will develop a proposal addressing the priority community issues of Early Childhood Development, Positive Youth Development, and Economic Prosperity. All applications must be completed by MIDNIGHT March 17, 2019 and submitted to Julie Singley, Program Manager, Community Impact, jsingley@berkshireunitedway.org

Purpose of the RFP: to build economic mobility through educational and employment opportunities that will have impactful outcomes for individuals and families from birth through adulthood.

Indicators of Success:
Berkshire County children will achieve reading proficiency as demonstrated by 3rd grade standardized tests
Berkshire County’s high school graduation rate will show a continuous upward trend
Reduction in the number and percentage of Berkshire County households earning less than $75,000

Eligibility Requirements
In order to continue the application process, all interested organizations must complete our online eligibility form and submit evidence of the following requirements. Click here: https://www.surveymonkey.com/r/EligibilityFeb2019

- be located in and primarily serving residents of central and southern Berkshire County;
- be a not-for-profit organization (501(c) 3 status is not required);
- be incorporated or chartered under appropriate local, state or federal statutes;
- abide by federal and state laws regarding non-discrimination and anti-terrorism;
have an active, locally based, volunteer board or elected body that meets regularly, makes policy decisions and holds election of officers;

- have an administrative structure with defined lines of responsibility, a mission statement and bylaws;

- be financially stable, perform a regular budgeting process and be able to submit audited financial statements and/or IRS Form 990 (with internal control deficiency letters if applicable);

- have current license, certification and permits if applicable;

- be providing services/activities that address Early Childhood Development, Positive Youth Development, or Economic Prosperity;

- be able to demonstrate effectiveness of its programs/services or activities through measurable outcomes, reporting on a quarterly basis. See Appendix A.

Applicants must submit required eligibility documentation to jsingley@berkshireunitedway.org. BUW will review materials and will confirm eligibility within 3 business days.

**Integrated/Collaborative Approaches**

Berkshire United Way brings people together to define our community’s social challenges and works collaboratively to identify strategies to combat these issues. With BUW’s leadership, local people and organizations accomplish more than any single person, program or agency can achieve alone. Through this RFP, BUW will support innovative collaborative approaches that are collectively working to address gaps in services (for any priority area). Examples of gaps include: early childhood education programs working together to fill open slots and cross sector alignment to help individuals obtain and retain jobs.

A minimum of 3 programs must be involved with a lead agency that is prepared to achieve and report on successful constituent outcomes in one of our existing strategies. One agency must be designated as the lead agency applying for a total amount of funding that is divided among collaborators. This lead agency is responsible for the coordination and oversight of the application. A program budget and agency budget must be submitted for each partner in the collaboration. Collaboratives must be able to report on all performance measures within one strategy (See Appendix A for strategies and performance measures).

Priority will be given to collaboratives applying in the strategies below:

- **Resource Coordination**
The purpose of an effective referral network is to ensure that applicants deliver activities in a coordinated way to improve participant outcomes. Applicants must have clear expectations for all participating partners, ensure that referrals are made as needed and handoffs between organizations occur in a seamless manner, ensure that necessary services are delivered effectively in a timely manner and outcomes are documented, and have a database in place by the start of the funding period that tracks referrals, interagency communication and outcomes.

- **Professional Development**
To provide opportunities for individuals and/or organizations to gain and improve the knowledge and skills important to their work. We know supporting and educating staff is
crucial to implementing cutting edge solutions and maximizing results for our community. Applicants must provide professional development opportunities that align with one or more of our priority areas and be able to report on participant outcomes. BUW encourages applicants to have a culture of continuous learning. Applicants may include providers of health curriculum, including Get Real. Additional examples of professional development projects include: https://hria.org/projects/best-initiative/.

- **Employment / Career Pathways**

To align with the Courses 2 Employment approach, integrating an industry strategy, education strategy, and support strategy. Applicants may apply as a collaborative and must be responsive to business needs and be flexible in offering training programs that provide appropriate technical skills training and basic skill development. Applicants must also offer intensive case management for adult learners including motivational support and coordinating referrals/follow through with social services, as needed. This approach combines the strengths of community colleges and local workforce nonprofits to serve students more effectively than either could alone. Applicants may target a specific industry or cluster of occupations, matching adult learner skills to specific job opportunities. For more information, see https://www.aspeninstitute.org/publications/courses-employment-partnering-create-paths-education-careers/

**Two Generation Approach (2G)**

Stronger family - child relationships and enhanced home environments promote positive outcomes for children and youth. Research shows that young children’s relationships with their primary caregivers have a major impact on their cognitive, linguistic, emotional, social and moral development. Throughout adolescence, supportive relationships promote positive youth outcomes, including academic achievement, educational attainment, participation in extracurriculars, and self-concept, while also buffering risk factors such as dropping out of school. According to a report by MENTOR, the consistent, enduring presence of a caring adult in a young person’s life can be the difference between staying in school or dropping out, making healthy decisions or engaging in risky behaviors, and realizing one’s potential or failing to achieve one’s dreams.

“Family” is defined as: the closest relationships that a child has, customarily thought of as a mother or father and siblings, but often including foster family, grandparents and others who are significant in the child’s life. “Family” can also be defined as the adult(s) who spends the most time with children or youth and may provide basic needs (food/shelter), and educational or emotional support (mentors/teachers). Adults can be parents/caregivers, mentors, coaches, teachers, etc. BUW recognizes that every child or youth needs at least one positive adult role model in their life. Priority will be given to applicants that offer intentional intergenerational activities that better support and help

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1 See http://www.americaspromise.org/sites/default/files/d8/WebsSupport_ResearchBrief_v2.pdf
3 See collaborative.org/early-childhood
4 See FSG – Improving the Odds. http://www.fsg.org/tools-and-resources/improving-odds
build stronger bonds between adults and children/youth. See Glossary for definition of intentional engagement.

The two-generation approach is a concept, in which programs align and integrate child and adult supports to maximize results for families. Often 2G approaches draw from five core components: early child development, postsecondary & employment pathways, family economic success, social capital, and health & well-being. Successful approaches are often intentional about building social capital (family, school, and community support). According to the Center for Promise: America’s Promise Alliance, “the assumption in many studies of social capital is that adults with higher levels of education and income provide young people with access and exposure to resources and networks otherwise not available to the child/youth. This exposure is subsequently useful for young people’s educational and professional advancement.”

See Appendix E for a list of evidence-based curricula/best practices.

Priority will be given to the following strategies in which the two-generation approach is inherent: Home Visiting (see Early Childhood), Mentoring (see Positive Youth Development), and Mobility Mentoring (see below).

- **Mobility Mentoring (Recommended evaluation tool is the Bridge to Self-Sufficiency):**
  To provide parents/caregivers with the skills to better support children/youth and to achieve personal/professional goals that will help increase their income and assets. Successful models include First Teacher parent-to-parent cooperative and the Intergenerational Mobility Project/Mobility Mentoring through EMPath. In these models, families set specific individual realistic goals for both adults and children to improve outcome level achievements. Mobility Mentoring is a “competency development model that builds off participants’ real-life challenges in five domains: family stability, well-being, financial management, education and training, and employment and career management.” Individual progress is measured through the Bridge to Self-Sufficiency, Child Bridge to a Brighter Future, and the Family Carpool Lane.

**Criteria**

Applicants will be evaluated across 4 criteria. Priority will be given to applicants that meet the following standards:

- **Program Quality** - implement evidence-based, strengths-based curricula with fidelity and/or align with best practices (meets criteria level of 3 or higher on evaluation rubric); be a minimum of 10 weeks; staff have related field credentials and participate in coalition activities (see Appendix D)
- **Promoting our Partnership** – when our funded partners promote our partnership, they demonstrate how together, we are building a stronger community in a

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“United Way.” These efforts support our fundraising efforts, which ultimately enable us to invest in quality programs throughout our community.

- Two-generation approach – i.e. highly intentional, high dosage experiences for adults and children/youth to build/strengthen intergenerational relationships that lead to increased knowledge, skills, and/or access to resources.
- Reach a Target Population – i.e. under-resourced individuals; priority will be given to applicants who households that are “near poor” – living with incomes above the poverty line and up to twice the official poverty line
- Evaluation – must demonstrate past evidence in achieving its intended outcomes and use strong evaluation tools (research based/connected to evidence-based curricula - i.e. APT-O, Survey of Academic and Youth Outcomes - SAYO, MA Work Based Learning Plan, Teaching Strategies Gold - TSG)

1) Early Childhood Development:

BUW’s early childhood strategies are rooted in an extensive review of the academic literature around the issues of early childhood development, school readiness, and early grade reading. A number of national initiatives, including those of United Way Worldwide (UWW) and the Annie E. Casey Foundation, have focused on 3rd grade reading skills as a critical intervention point in school success. The literature is clear: failure to read at grade-level by the end of 3rd grade is directly linked to long-term academic challenges, non-adaptive behaviors, and failure to complete high school. Simply stated, until 3rd grade children are learning to read; after 3rd grade they are reading to learn. Without solid reading skills children will struggle in all of their academic efforts.

Current Conditions:

![Graph showing 3rd Grade English scores for Berkshire County, Berkshire County PARCC, Massachusetts MCAS, and Massachusetts PARCC from 2006 to 2018.](Berkshire_Benchmarks_2018.png)
The strategies that address Early Childhood Development are:

- **Home Visiting** *(Recommended evaluation tools are Parent and Child Together, Child Behavior Traits, Ages and Stages)*
  BUW is committed to ensuring that all children and families have access to quality early childhood learning experiences. To that end, BUW encourages early childhood providers to apply for funds to implement an evidence-based home visiting program with fidelity, including Healthy Families, Parent Child Home Program, and Parents as Teachers.\(^8\) We encourage existing home visiting providers to apply to expand their services and reach more clients (which may be reflected in your program budget). See Appendix E for examples of evidence-based programs.

- **Quality Early Childhood Education** *(programs can include serving elementary school students up to age 12 if licensed through the Department of Early Education and Care or Department of Elementary and Secondary Education) (Recommended evaluation tools are Teaching Strategies Gold, Ages and Stages)*
  To identify high-quality early learning programs that prepare all young children for success in school. Early care and education programs must be on the state of Massachusetts Quality Rating Improvement System (QRIS) and indicate what level they have achieved on the QRIS. Learning and development must be screened and assessed through the use of quality, research-based screening and assessment tools: i.e. Ages and Stages Questionnaire (ASQ/ASQ_SE) to identify children with developmental delays and the Massachusetts Department of Early Care and Education approved assessment tool: Teaching Strategies Gold. Qualified and appropriately

\(^8\) See Appendix C for a definition
compensated personnel, small group sizes and low adult-child ratios, language-rich environments, developmentally appropriate “curricula,” safe physical settings, and warm and responsive adult-child interactions all lead to improved child outcomes.

**Note:** For early childhood education providers with more than one location/site, applicants must complete a Program Measures form per location/site. If program consists of family child care providers, applicant may group these all as one site/location. Grantees will be required to report program measures and client demographics for each location/site.

- **Early Intervention Services** *(Recommended evaluation tools are Batelle Developmental Inventory and Michigan Early Intervention Profile, Shelter Child Needs Assessment)*
  To identify children with developmental or behavioral concerns or delays through screening and/or developmental assessment to promote healthy development in all domains (including use of the ASQ). Effective approaches to intervention are individualized and tailored to the goals and needs of children and their families. Identifying children’s developmental or behavioral concerns or delays early through screening and assessment can change the trajectory of a child’s life by helping to ensure that the families of young children have timely access to needed support services.

2) **Positive Youth Development:**

In line with a two-generation approach, BUW will support programs that foster healthy youth development and help strengthen family/community supports, so that youth and caregivers may succeed in school, work, and life. One of the most critical protective factors is the importance of youth having supportive relationships with caring adults. Further, research shows that educational attainment is a key predictor of a variety of outcomes, including teen childbearing, crime, higher earnings, and social well-being. Positive relationships are critical to the success of young people, including later employability and job quality. ⁹ An effective evaluation tool for youth programming are the MA Work Based Learning Plan and Survey of Academic and Youth Outcomes (SAYO). For additional information on identifying program measures, visit http://tooffind.org/

See Appendix E for a list of evidence-based curricula/best practices.

**Current Conditions:**

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⁹ See Brookings Institute Report entitled, Pathways to High Quality Jobs for Young Adults, October 2018.
The strategies that address Positive Youth Development are:

- **Mentoring** *(Recommended evaluation tools are mentor and mentee pre and post surveys through Mass Mentoring Partnership)*

  Research shows that mentoring programs are most effective when youth and adults develop a supportive and trusting relationship. "Mentoring can significantly shape the path to a successful adulthood. A meta-analysis of 73 independent evaluations...showed that mentoring improves a young person’s behavioral, social, emotional, and academic..."
outcomes simultaneously.”10 “As an entry point into the world of work, there is a long tradition of apprenticeships, internships, and other relationship-based strategies...showing they are effective in helping youth find, prepare for and succeed in careers.”11 Within the workplace, mentoring occurs when students are paired with an employee who assesses his/her performance and helps the youth master certain skills and knowledge.12 Career based mentoring enables adults to provide youth with the chance to learn skills that employers seek in new hires, such as problem-solving, communication, and teamwork. Priority will be given to applicants offering career-based mentoring to youth.

Mentoring programs “build on and cultivate informal supports and empower youth to identify and reach out to networks of potential supportive adults.”13 Effective models include: school-based programs, career-exploration and internship mentoring and one-on-one youth-adult mentoring. Other effective mentoring program models include group mentoring (one mentor to several mentees), team mentoring (multiple mentors to one mentee), and peer mentoring (mentors and mentees are relatively close in age, could be in a one-on-one or group setting). Applicants must align with MENTOR’s Elements of Effective Practice. For more information on effective program models/technical assistance, please refer to Mass Mentoring Partnership: http://massmentors.org/ and MENTOR, the National Mentoring Partnership www.mentoring.org. We encourage programs to keep an open mind about incorporating evidence-based mentoring practices through the Elements of Effective Practice and to think creatively about how they can meet or modify these practices for optimal effectiveness in their unique program circumstances.14

- **Career Readiness (K – 12 focused on soft skill development)** (Recommended evaluation tool is MA Work Based Learning Plan and/or Survey of Academic and Youth Outcomes)

To identify programs that provide youth with the building blocks they need to achieve their individual learning and/or work readiness goals. Programs should encourage youth to achieve age appropriate success in academic or work experience, specifically related to annual grade progression and/or workforce preparedness. The Department of Elementary and Secondary Education (DESE) frames career readiness activities in three parts: “Career Awareness” or becoming ‘aware’ of potential careers; “Career Exploration” or ‘exploring’ career interest areas & career readiness; and “Career Immersion” or learning the specifics skills & knowledge within a career pathway area.15

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11 See MENTORING: A CRITICAL SUPPORT STRATEGY FOR YOUTH CAREER ENGAGEMENT AND WORKFORCE DEVELOPMENT. Report by: Root Cause for MENTOR: The National Mentoring Partnership and supported by the Open Society Foundations
12 See Brookings Institute Report entitled, Pathways to High Quality Jobs for Young Adults, October 2018.
15 See DESE / BCREB) For more information see the Career Development Education Glossary Guide: https://drive.google.com/file/d/1X_Oef6wDCDCoHR-Ku7oOpU2eE_7CA3cQ/view?usp=sharing
**Note:** Any organization that provides curricula that is implemented in classrooms during the school day and/or any organization relying on a key partner for access to children/youth must have a Memorandum of Understanding (MOU) with the school district(s) and/or key partner(s).

**3) Economic Prosperity**

For several years, Berkshire United Way has partnered with many organizations to address the challenges local families are experiencing that negatively impact their financial stability. More recently we have been approached by several of our corporate partners noting an interest to further engage their employees and companies in financial literacy/education and strategies that will help families along the path to sustainable incomes. While connecting families to income boosting benefits such as SNAP, Transitional Assistance, and Earned Income Tax Credits is important in the short term, our belief is that we need to move from short term program interventions to long term, systems strategies that build pathways to sustainable income for individuals and families in the community. This also supports local businesses’ workforce development needs, helping to build prosperity for all.

**Current Conditions (Berkshire County):**

![Graph showing work status from 2010 to 2017](Berkshire Benchmarks, 2019)
The strategies that address Economic Prosperity are:

- **Internships (16 – 24) (Recommended evaluation tool is MA Work Based Learning Plan)**
  
  To provide youth, non-working or under-employed young adults with work-based experiential learning/internship opportunities they need to succeed in the world of work. Work based learning with high schools and career and technical education provide students the ability to learn employability skills such as problem solving, communication, and teamwork. Applicants may also provide full-time employed adults with experiential learning/internship opportunities in order to enhance their skills and careers. The intention is to provide local adults with on the job training, so they are better positioned to seek employment and/or advance in their career in Berkshire County. Program staff must work closely with employers to identify industries with open jobs and career pathways that will provide a sustainable income.

- **Volunteer Income Tax Assistance Program (VITA) (Recommended evaluation tool is Taxslayer)**

  VITA provides free income tax preparation assistance to individuals and families with a household income of approximately $55,000 a year or less, in which filers may qualify for the Earned Income Tax Credit (EITC), up to $6,200 and/or qualify for other tax credits. The EITC is the most successful means-tested program in lifting families and children out of poverty. According to the IRS, one in five eligible workers fail to claim the EITC.

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16 See Brookings Institute Report entitled, Pathways to High Quality Jobs for Young Adults, October 2018.
According to the Center for Budget and Policy Priorities, research show that the EITC helps families throughout their life – improved infant and material health, better school performance, greater college enrollment, increased work and earnings in the next generation and Social Security retirement benefits.

Six years ago, the IRS came to Berkshire United Way to request that we partner with them and our local community to develop a countywide plan to broaden the reach of the Volunteer Income Tax Assistance (VITA) program. In reviewing our local data, they determined that here in Berkshire County, less than $500,000 was being returned to low-income working families, while their estimate was that the returns should be closer to $4 million. With a median income of just over $52,000, half of our Berkshire County neighbors were eligible to participate in the program this year.

For the 2017 tax year, reports from the IRS indicate that a total of 1,537 federal tax returns were completed by Berkshire County VITA sites for 2017, resulting in a total of $2.2 million in federal dollars being returned to our community.
Questions (Application Narrative)

Instructions: Please respond to each question via Word within the 2000-character limit. Applications must be no longer than 10 pages. Each question will be evaluated based on the Evaluation Rubric. Please note that organizations must complete a separate application for each strategy to which they are applying.

For applicants with more than one location/site, applicants must complete a Performance Measures form per location/site. If program consists of family child care providers, applicant may group these all as one site/location.

Program Design

1. Provide a brief description of the program/activity, including the specific strategies to be implemented (reference evidence-based curriculum with fidelity, research based best practices, and alignment with a strengths-based approach).
2. What are the program’s goals and objectives for the next 1 – 5 years to maximize results for individuals in the program?
3. What is the program duration? (day(s)/weeks/months)
4. How many hours per week/month do individuals interact with a trained staff or mentor?
5. What are the credentials of your staff?
6. How is your program collaborating with existing community partners to ensure chance of individuals' success and to limit duplication of services? Specify whether the collaboration is formal or informal. Formal = signed agreement where different entities have clear roles, responsibilities and accountability. See Glossary for a definition of collaboration
7. How will you leverage Berkshire United Way investment to secure funding from additional sources?

Promoting our Partnership

8. Please describe how your organization will promote our partnership to your staff, constituents and the community.

Two Generation Approach


Target Population

10. Describe the individuals/families you are serving, including geographic location and under resourced populations (low income, special needs, ELL, etc.). Include expected numbers served for each. For regional and community level data, refer to www.berkshirebenchmarks.org
11. How will individuals be recruited for the program (i.e. describe your outreach plan)?
12. How are individuals supported to completion and what methods do you have in place to continue to follow up at 6 months and a year?
Evaluation
13. How is individual success measured? Describe evaluation tools used (success = changes in behavior, attitude, skills, and/or circumstance.)
14. Describe how feedback will be collected from individuals to measure the effectiveness of the program/activity. Describe evaluation tools used.
15. Please explain the multiplier effect of your program (e.g. public/private partnerships; impact on policy; reaching community goals of 3rd grade reading proficiency, high school graduation, and/or economic mobility for individuals). Please reference data/prior successes.

Performance Measures (see Appendix A):
Enter cumulative target values for all performance measures within the strategy to which you are applying for each quarter (Q1 – July – Sept; Q2 – Oct. - Dec; Q3 – Jan – March; Q4 April – June).
Note: Target values may be adjusted for grantees based on prior performance and benchmarking

Program Budget and Agency Financials (submit via email to Julie Singley no later than March 17th)
Financial documentation includes:
- Most recent Financial Audit, all written communications from auditor including Management Letter comments and reports on internal control deficiencies (or Review level financials statements if the Organization is not audited by an independent auditor);
- Most recent Form 990; AND
- Agency Budget – via EXCEL template
- Program Budget – via EXCEL template

Funding and Budget Expectations:
Budgets for programs can include: funds to train staff in evidence-based curricula/best practices for children/youth and/or to provide intentional 2G curricula for families (include staff time for training), required program materials, use of data collection/evaluation tools, and any licensing fees, if applicable. Berkshire United Way reserves the right to manage the training process and funding directly if multiple agencies are interested in adopting the same program or curriculum.

BUW supports the use of various data collection/evaluation methods, including formative assessments, pre/post surveys, observations, case notes, interviews, etc. Each program should use the tool(s) that best aligns with your work and allows you to measure impact (i.e. the number of children/youth progressing). Sample evaluation tools can be found here: http://performwell.org/

Budget will be evaluated by BUW trained volunteers. Include in budget any expenses for use of evidence-based curricula, training/certification, data collection and tracking tools, etc. BUW funding request must not exceed 50% of the total budgeted revenue.

If awarded funding, BUW reserves the right to negotiate program monthly billable unit rates. In determining unit rates, BUW will consider the nature of the service delivery, national/state regulations, and an applicant’s anticipated program income and offsets.
Applications will be evaluated based on the Evaluation Rubric (see EXCEL). BUW trained volunteers will review and select a numerical value that best matches the criteria for each question. Program and financial reviewers will ensure that all applicants are compliant with the RFP guidelines, address improving outcomes for individuals and families, and ensure that there is a clear and concise operating budget that reflects transparency and accountability.

Scoring:

An additional 4 points will be given to organizations applying under the strategies for Integrated/Collaborative Approaches or Two Generation Approach.

<table>
<thead>
<tr>
<th>Score Range</th>
<th>Description</th>
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<tbody>
<tr>
<td>1-15</td>
<td>Unsatisfactory</td>
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<tr>
<td>16-30</td>
<td>Fair</td>
</tr>
<tr>
<td>31-49</td>
<td>Effective</td>
</tr>
<tr>
<td>50-60</td>
<td>Excellent</td>
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Total score potential: 64

Decision Process

Berkshire United Way will utilize trained community investment volunteers to review and evaluate proposals. The volunteers are screened to ensure they are free of conflicts or perceived conflicts of interest and will base their recommendations for funding on the overall assessment score, the clarity and thoroughness of proposals, the ability to document and track results, and the evidence or likelihood that the applicant will be successful at addressing the priority community issue. The Community Investment volunteers will make recommendations to the Berkshire United Way Board of Directors who will make final funding decisions. All decisions are final; there is no appeal process.

Timeline

February 8                 RFP Released
February 12               Bidder’s Conferences
February 17               Questions Due
February 22               Questions + Answers posted on BUW website
March 17                  Completed applications due by midnight
March - May               Application Review
June                      Funding Notification to Applicants via email
July 1, 2019 – June 30, 2020 Initial Funded Contract Period
LATE OR INCOMPLETE PROPOSALS WILL NOT BE ACCEPTED. Applicants may submit questions on the Request for Proposal via email to <jsingley@berkshireunitedway.org> by February 17, 2019. For technical assistance, email Julie Singley, Program Manager, Community Impact, NO LATER THAN NOON on March 14. Questions will not be answered after 3/14.

Materials Required

Applicants should use this list to compile all documentation required for your Berkshire United Way Community Impact Funding Application DUE BY MIDNIGHT March 17, 2019. ALL materials must be emailed to jsingley@berkshireunitedway.org

<table>
<thead>
<tr>
<th>Step 1: Complete Eligibility Form (via Survey Monkey)</th>
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<tbody>
<tr>
<td>Documentation of not for profit status and/or Certification for Solicitation if 501(c)3 (Eligibility)</td>
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<tr>
<td>Documentation of non-discrimination policy (Eligibility)</td>
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<tr>
<td>Documentation of administrative structure, including mission statement, bylaws (Eligibility)</td>
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<tr>
<td>List of current Board or elected body (Eligibility)</td>
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<thead>
<tr>
<th>Step 2: Complete Financial Documentation</th>
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<tr>
<td>FYE 2018 or most recent Financial Audit, Management Letter if applicable and corresponding corrective action plan (due via email)</td>
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<tr>
<td>FYE 2018 or most recent Form 990 (signed by organization staff or volunteer officer and internal control deficiency letter(s) if applicable). (due via email)</td>
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<tr>
<td>Agency Budget Form (via EXCEL template – submit via email)</td>
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<tr>
<td>Program Budget Form (BUW funding request must not exceed 50% of the total program budgeted revenue. Programs should achieve broad community and other support to maintain and improve sustainability.) (via EXCEL template)</td>
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<thead>
<tr>
<th>Step 3: Complete Program Narrative and Performance Measures:</th>
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<tbody>
<tr>
<td>Community Impact Funding Application Form (narrative) (via Word)</td>
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<tr>
<td>Community Impact Measures Form (Complete all performance measures within the selected strategy in Early Childhood Development, Positive Youth Development, Economic Prosperity, Mobility Mentoring, Resource Coordination, or Professional Development) (via Word – see Appendix A)</td>
</tr>
</tbody>
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Appendix A. Performance Measures

Integrated Strategies:

Resource Coordination
a. Number of families served
b. Number of families connected to services in the community
c. Number of families reporting they are receiving services from other organizations resulting in improved outcomes
d. Number of organizations engaged with this program
e. Number of new partnerships
f. Number of partners reporting that care coordination is leading to improved outcomes for families
g. Number of partners reporting they are connecting clients to more resources

Professional Development
a. Number of adults trained
b. Number of youth trained
c. Number of individuals completing survey
d. Number of agencies participating in training
e. Number of individuals reporting they will use at least one strategy or idea presented in the workshop
f. Number of individuals reporting improved soft skills and/or workplace skills (i.e. critical thinking/problem solving skills, communication, teamwork and collaboration)

Two-Generation Approach:

Mobility Mentoring (Bridge to Self-Sufficiency)
a. Number of individuals served
b. Number of individuals enrolled in education or training program
c. Number of individuals graduating from education or training program
d. Number of individuals maintaining or improving on 3 or more of the 5 Bridge to Self-Sufficiency domains
e. Number of individuals who gain employment
f. Number of individuals retaining job for 6+ months

Early Childhood Development (0 - 5)
Indicator: 3rd grade reading proficiency
Aspirational: Kindergarten Readiness

1. Quality Early Childhood Education (Teaching Strategies Gold, Ages and Stages)
a. Number of children enrolled in programming
b. Number of children progressing or maintaining age appropriate in social/emotional
c. Number of children progressing or maintaining age appropriate in language development
d. Number of adults served that are provided with information, resources, tools, trainings, and/or teaching skills (i.e. parents/caregivers, mentors, coaches, teachers, etc.)
e. Number of adults engaging with child/youth at least 3 times per week (i.e. reading, telling stories, singing songs, sharing ideas, and/or talking about things that matter to child)
f. Number of children and adults referred to services in the community
g. Number of children and adults reporting they are receiving the referred services in the community

b. Number of children enrolled
c. Number of parents/caregivers enrolled
d. Number of children progressing or maintaining age appropriate in social/emotional
e. Number of children progressing or maintaining age appropriate in language development
f. Number of adults served that are provided with information, resources, tools, trainings, and/or teaching skills (i.e. parents/caregivers, mentors, coaches, teachers, etc.)
g. Number of adults engaging with child/youth at least 3 times per week (i.e. reading, telling stories, singing songs, sharing ideas, and/or talking about things that matter to child)
h. Number of children and adults referred to services in the community
i. Number of children and adults reporting they are receiving the referred services in the community

3. Early Intervention (Batelle Developmental Inventory and Michigan Early Intervention Profile, Shelter Child Needs Assessment)
a. Number of children receiving recommended services at agency
b. Number of children progressing or maintaining in social/emotional – (formerly demonstrating improved social/emotional functioning)
c. Number of children progressing or maintaining age appropriate in language development
d. Number of adults served that are provided with information, resources, tools, trainings, and/or teaching skills (i.e. parents/caregivers, mentors, coaches, teachers, etc.)
e. Number of adults engaging with child/youth at least 3 times per week (i.e. reading, telling stories, singing songs, sharing ideas, and/or talking about things that matter to child)
f. Number of children and adults referred to services in the community
g. Number of children and adults reporting they are receiving the referred services in the community

**Positive Youth Development (K - 12)**

**Indicators**: High school graduation

Aspirational: Plans for Career and/or College

1. Mentoring (mentor and mentee pre and post surveys through Mass Mentoring Partnership)
a. Number of mentees
b. Number of mentors
c. Number of mentees who develop soft skills (i.e. critical thinking/problem solving, communication, and teamwork and collaboration)
d. Number of mentees who report feeling connected to caring adults/positive role models and/or the community
e. Number of adults (mentors) served that are provided with information, resources, tools, trainings, and/or teaching skills (i.e. parents/caregivers, mentors, coaches, teachers, etc.)
f. Number of adults (mentors) engaging with youth at least 3 times per week (i.e. attending sporting events, helping with homework, family game night, eating dinner together)
g. Number of mentees and adults referred to services in the community
h. Number of mentees and adults reporting they are receiving the referred services in the community

2. Career Readiness (MA Work Based Learning Plan, Survey of After School and Youth Outcomes))
   a. Number of youth enrolled in job or education skills training
   b. Number of youth who develop soft skills (i.e. critical thinking/problem solving, communication, and teamwork and collaboration)
   c. Number of youth who identify positive plans for the future (i.e. considering employment, further education, or certifications)
   d. Of c above, number of youth who gain employment or internships
   e. Number of adults served that are provided with information, resources, tools, trainings, and/or teaching skills (i.e. parents/caregivers, mentors, coaches, teachers, etc.)
   f. Number of adults engaging with youth at least 3 times per week (i.e. attending sporting events, helping with homework, family game night, eating dinner together)
   g. Number of youth and adults referred to services in the community
   h. Number of youth and adults reporting they are receiving the referred services in the community

**Economic Prosperity**

**Indicators:** Household Income

1. Employment / Career Pathways
   a. Number of individuals who receive job skills training
   b. Number of individuals who earn job-relevant licenses, certificates, and/or credentials
   c. Number of individuals who gain employment
   d. Number of individuals retaining job for 6+ months
   e. Number of individuals who increase their wages
   f. Number of individuals who increase disposable income by accessing benefits and/or reducing costs
   g. Number of adults referred to services in the community
   h. Number of adults reporting they are receiving the referred services in the community

2. Internships (16 – 24) (MA Work Based Learning Plan)
   a. Number of individuals enrolled in internships
b. Number of individuals meeting or exceeding expectations on the Work Ethic and Professionalism Skills Scale (Attendance and Punctuality, Workplace Appearance, Accepting Direction and Constructive Criticism, Motivation and Taking Initiative, Understanding Workplace Culture, Policy, and Safety)

c. Number of individuals meeting or exceeding expectations on the Communication and Interpersonal Skills Scale (Speaking, Listening, Interacting with Co-Workers)

d. Number of participants who secure employment in Berkshire County as a result of work-based experiences

e. Number of adults referred to services in the community

f. Number of adults reporting they are receiving the referred services in the community

3. Volunteer Income Tax Assistance (VITA) (Taxslayer reports)
   a. Number of Federal Returns
   b. Number of State Returns
   c. Number of Earned Income Tax Credit (EITC)
   d. Total $ Amount EITC
   e. Total $ Refund Amount
### Appendix B: Demographics

**GENDER**
- Male
- Female
- Transgender
- Unknown Gender
- Total

**MARITAL STATUS OF HOUSEHOLD**
- Married
- Single/Never Married
- Divorced/Separated
- Widowed
- Co-habitating/Living with Partner
- Other Status
- Unknown Status
- Total

**AGE GROUP**
- Under 5 years
- 5 through 9
- 10 through 14
- 15 through 19
- 20 through 24
- 25 through 59
- 60 through 64
- 65 +
- Unknown Age
- Total

**EDUCATIONAL ATTAINMENT**
(Highest Level of Education Completed in the Home)
- Less than 9th grade
- 9th through 12th grade
- High School graduate or equivalent
- Some College (no degree)
- Associate Degree
- Bachelor’s Degree
- Post Graduate Degree
- Unknown Education
- Total by Education

**RACIAL BACKGROUND**
- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian and Other Pacific Islander
- Latino or Hispanic
- White/Caucasian
- Multi-Racial
- Other Background
- Unknown Background
- Total by Background

**HOUSEHOLD INCOME**
- Less than $10,000
- $10,000 - $14,999
- $15,000 - $24,999
- $25,000 - $34,999
- $35,000 - $49,999
- $50,000 - $74,999
- $75,000 and over
- Unknown Income
- Total by Income
Geography
North Berkshire County
Adams
Cheshire
Clarksburg
Florida
North Adams
Williamstown
Homeless
Total

Central Berkshire County
Becket
Dalton
Hancock
Hinsdale
Lanesborough
Lee
Lenox
New Ashford
Peru
Pittsfield
Richmond
Savoy
Washington
Windsor
Homeless
Total

South Berkshire County
Alford
Egremont
Great Barrington
Monterey
Mount Washington
New Marlborough
Otis
Sandisfield
Sheffield
Stockbridge
Tyringham
West Stockbridge
Homeless
Total

Outside Berkshire County
Total
Appendix C. Glossary

**Best Practices**: techniques supported by research and experience that have been proven to reliably lead to desired results

**Collaborative Approaches**: A mutually beneficial and well-defined relationship entered into by two or more organizations to achieve common goals. The relationship includes a commitment to: 1) a shared vision and mutual goals 2) a jointly developed structure, shared responsibility, and agreed-upon methods of communication 3) mutual authority and accountability for success and 4) sharing of resources and rewards.\(^{17}\) Collaboration requires commitment to participate in shared decision making, allocation of resources, and shared accountability. Collaboration is beyond making referrals to each other. Source: http://www.aecf.org/resources/creating-opportunity-for-families/

**Evidence-based programs**: most effective community-based solutions that provide a platform for expansion and replication based on a rigorous experimental or quasi-experimental study design to identify positive community impacts on a variety of social issues. In order to qualify as evidence based, a program must show: that the expected positive results are attributed to the program itself, be peer-reviewed by experts in the field, and be endorsed by a federal agency.

**Fidelity**: Staying true to the formalized implementation according to structure and original program design.

**Indicator**: A measure that helps quantify the achievement of a result.

**Intentional Engagement**: Programming has specific goals or outcomes in mind.\(^{18}\)

**Multiplier Effect**: Summarizes the total impact that can be expected from change in a given economic activity. Investments spur ripple effects or spin-off activities. For more information see: https://www.uaex.edu/business-communities/economic-development/FSCED6.pdf

**Result**: A condition of well-being for children, adults, families or communities. The outcome of a particular strategy, activity, or series of strategies and activities on recipients (child(ren), youth, adults, family, community).

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\(^{18}\) See 5 Strategies to Intentionally Engage Students, Adam Cebulski, Office of Research and Strategic Initiatives, Lean Forward. Website: www.orgsync.com
**Results-Based Accountability (RBA):** A disciplined way of taking action that a community can use to improve the lives of children, youth, and adults. RBA can also be used by agencies and organizations to improve the performance of its programs.

**Population Accountability:** For communities, cities, districts, counties - about the well-being of whole populations; Consists of cross community partnerships to make progress on quality of life for any population.

**Population Accountability Questions**
1. What are the quality of life conditions we want for the children, adults, and families in our community?
2. What would these conditions look like if we could see them?
3. How can we measure these conditions?
4. How are we doing on the most important of these measures?
5. Who are the partners that have a role to play in doing better?
6. What works to do better, including no-cost and low-cost ideas?
7. What do we propose to do?

**Population Results:** The focus of Results Based Accountability, a condition of well-being for children, adults, seniors, families and communities, stated in plain language. For example, the number of children entering school ready to learn based on third grade reading scores. Our work is focused on changing community conditions for entire populations rather than just the recipients of services funded by United Way. Example: reading scores, graduation rate in Berkshire County

**Performance Accountability:** For clients of programs, agencies, teams and service systems; Performance measures make sure programs and services are working as well as possible.

**Performance Accountability Questions**
1. Who are our customers?
2. How can we measure if our customers are better off?
3. How can we measure if we are delivering services/care well?
4. How are we doing on the most important of these measures?
5. Who are the partners that have a role to play in doing better?
6. What works to do better, including no-cost and low-cost ideas?
7. What do we propose to do?

**Performance Measures:** Measures of how well a strategy, program, agency or service system is working. The most important performance measure tells us whether program customers are better off. We refer to these as client results to distinguish them from population results. Results Based Accountability uses three types of performance measures:
- How much did we do? i.e. # clients served, # of activities
- How well did we do it? i.e. staff turnover rate, staff/client morale
- Is anyone better off? i.e. % skills/knowledge, % attitude/opinion, % behavior, % circumstance
**Scorecard:** Clear Impact Scorecard is a web-based software for measuring and reporting performance at both the population and program levels. The software consists of interactive scorecards, strategy map visualizations, and Gantt Chart project management tools.

**Social Capital:** A set of social resources that are accessed and exchanged in relationships between people and institutions.


**Sustainable Income:** Income which is required by any family/individuals to meet all basic expenses in the present and future. Basic expenses include: food, child care, medical, housing, transportation, other, annual taxes. © 2017 Dr. Amy K. Glasmeier and the Massachusetts Institute of Technology

**Two-Generation Approach:** Programs that provide intensive services to children, adolescents, or caregivers but also offer opportunities and meet the needs of all generation(s) through education, connection to economic supports, and/or the development of social capital.

Source: http://www.aecf.org/resources/creating-opportunity-for-families
Appendix D. Community Coalitions

Current Coalitions Supported by Berkshire United Way:
In addition to investing in programs and services to address community needs, Berkshire United Way provides leadership and mobilizes the community to engage in and leverage resources to support several local coalitions. These coalitions help increase the capacity of the community to address priority issues and create sustainable change.

Early Childhood Impact Council (ECIC):
Early childhood development initiatives of BUW involve both community efforts and targeted strategies aimed at improving the lives of young children and their families. Over the past few years, BUW staff and volunteers have recognized and responded to the urgent need to improve educational opportunities for children from birth to 3rd grade, with a goal of reaching a 90% proficiency rate for all third graders in Berkshire County by 2020. Recent results from 2018 MA standardized test shows that 45% of Berkshire County third graders are reading proficiently, which is considerably lower than the state average of 52%. With more than 40% of Berkshire County third graders living in economically disadvantaged households in 2016, this goal involves an intensive effort that mobilizes the whole community. BUW leads one countywide council - Early Childhood Impact Council and two regional coalitions – Pittsfield Promise and Chapter One.

Coalition activities address systems-change work: using shared measurement to build and drive strategies; influencing policy change through advocacy efforts; improving access to early learning environments; providing professional development opportunities to ensure quality of programming and improving coordination of resource services for families.

Positive Youth Development Impact Council (PYDIC):
The Positive Youth Development Impact Council is a Berkshire United Way countywide, community led committee that aims to increase the four-year high school graduation rate and make sure every student graduates with a college or career plan. PYDIC works with existing youth development initiatives, community organizations, local businesses, schools, and community members.
- Workgroups include:
  - Berkshire Youth Development Project - organizes the countywide Prevention Needs Assessment Survey and uses the results to leverage state and federal funding, share strategies, and host countywide youth and youth worker conferences. Strong focus on professional development for youth workers and networking opportunities to share experiences in the field
  - Mentoring - with the goal of increasing the number and quality of mentoring relationships (informal and formal) in the county
  - Talent and Skill Development - with the goal of increased awareness of career readiness opportunities and the development of employability skills that translate across sectors youth may be interested in pursuing.

Website: http://www.berkshireunitedway.org/positive-youth-development-impact-council
**Economic Prosperity Impact Council (EPIC):**
In 2016, there were more than 17,000 unemployed individuals in Berkshire County. According to the Department of Labor, there are roughly more than 1,500 continual job openings in Berkshire County.

In this context, the Economic Prosperity Impact Council (EPIC) was first convened in September 2017 by Berkshire United Way to bring together leaders from financial institutions, businesses, education, non-profits, workforce development, individuals with lived experience, and government for the dual purpose of:

(1) getting more people to work and filling vacant jobs; and
(2) addressing the hiring and worker retention needs of businesses.

Our indicator for success is reducing the number and percentage of households earning less than $75,000.

EPIC has attracted a committed group of nearly 40 members from a broad and deep network of organizations in the Berkshires who are contributing their ideas, time and resources to creating innovative solutions to better fill existing job openings and improve alignment among job seekers, employers, professional development services, and human support services.

Website: [https://www.berkshireunitedway.org/economic-prosperity-impact-council-epic](https://www.berkshireunitedway.org/economic-prosperity-impact-council-epic)
Appendix E. Resources for Examples of Evidence-Based Programs/Curricula

Parents as Teachers (http://www.parentsasteachers.org/)
The philosophy of Parents as Teachers (PAT) is to provide parents with child development knowledge and parenting support. Through a four-part intervention model known as the PAT Born to Learn® model, trained and certified parent educators offer support to families from pregnancy to the time the children enter kindergarten. PAT raises awareness around the importance of enhancing school readiness by reaching children during their critical, formative years of life. For information on the 18 Essential Requirements for Affiliates, refer to: (http://www.parentsasteachers.org/images/stories/documents/Essential_Requirements_9-5-12.pdf).

Parent-Child Home Program (http://www.parent-child.org/)
The Parent-Child Home Program (PCHP) is a research based and research validated early childhood literacy and school readiness program that models behaviors for parents to enhance children’s development. PCHP bridges the “preparation gap” by helping families challenged by poverty, limited education, language and literacy barriers, and other obstacles to school success prepare their children to enter school ready to be in the classroom. For instructions on program implementation, refer to: (http://www.parent-child.org/program-implementation-start-a-local-site.html).

Healthy Families America (http://www.healthyfamiliesamerica.org/home/index.shtml)
Healthy Families America (HFA) is a nationally recognized evidence-based home visiting program model designed to work with overburdened families who are at-risk for adverse childhood experiences, including child maltreatment. The home visiting model is equipped to work with families who may have histories of trauma, intimate partner violence, mental health, and/or substance abuse issues. HFA services begin prenatally or right after the birth of a baby and are offered voluntarily, intensively and over the long-term (3 to 5 years after the birth of the baby). For a list of critical program elements, refer to: (http://www.healthyfamiliesamerica.org/about_us/critical_elements.shtml)

Massachusetts (MA) Standards of Preschool Education:
The MA Standards for Preschool and Kindergarten in the Domains of Social and Emotional Learning, and Approaches to Play and Learning bring attention to these critical areas of development and learning, and further support a learning continuum from birth through school age and give the early childhood field a framework for best practices to support the development of these important competencies. The Standards focus on the following areas: Self-Knowledge, Self-Management, Social Knowledge, Relationship Skills, Responsible Decision-Making, Initiative, Curiosity, Engagement/Persistence, Creativity, Cooperative Play and Learning, Problem Solving, Organizational Skills, and Memory. For more information, visit http://www.mass.gov/edu/birth-grade-12/early-education-and-care/curriculum-and-learning/

The Creative Curriculum:
The Creative Curriculum® for Preschool is a comprehensive, research-based curriculum that features exploration and discovery as a way of learning. The Foundation helps teachers create a high-quality learning environment and build a thorough understanding of best practices. And Daily Resources help teachers plan and manage every moment of their day. Through studies, which are hands-on, project-based investigations, The Creative Curriculum® for Preschool helps teachers build children’s confidence, creativity
and critical thinking skills and promote positive outcomes. Teaching Strategies GOLD is an observation-based assessment system that helps teachers and administrators focus on what matters most for children’s success. For more information, visit https://teachingstrategies.com/curriculum/

First Teacher: Power to the Parents: A community of parents/caregivers working together to prepare children for success in kindergarten and beyond. First Teacher encourages parents/caregivers to recognize their role as their child’s first teacher, creating a community where parents learn, teach, and connect with each other to help their children become ready for school and beyond. For more information, visit https://www.firstteacherboston.org/our-work/

Mobility Mentoring: In 2009, EmPath developed the concept of Mobility Mentoring, a long-term program that supports a person’s progress using five pillars from their model entitled Bridge to Self-Sufficiency to result in economic security (five pillars are: family stability, well-being, education and training, financial management, and employment and career management). Mobility Mentoring:

- Provides safe housing, supports, education, and training programs
- Leads to the following outcomes: family stability; education/training; financial management; employment
- Provides intensive case management, individualized and personalized goal-setting

For more information, refer to: http://www.liveworkthrive.org/research_and_tools/mobility_mentoring

Year Up: Year Up’s mission is to close the Opportunity Divide by connecting low-income young adults ages 18-24 who need opportunities with potential employers who need talent. Year Up seeks to create a pathway to professional careers and higher education for young adults by offering a:

- One-year, intensive training program offering a combination of hands-on skill development, college credits, and corporate internships
- Adopting a high expectation, high support model that focuses on students’ professional development

For more information, refer to http://www.yearup.org/about/main.php?page=program

Other Resources for Evidence-Based Programs/Curricula:
- County Health Rankings and Roadmaps: A Healthier Nation County by County (http://www.countyhealthrankings.org/roadmaps)
- The California Evidence-Based Clearinghouse for Child Welfare (http://www.cebc4cw.org/)
- ETR Health Promotions evidence-based programs: https://www.etr.org/ebi/programs/
- Find Youth Info (http://www.finyouthinfo.gov/youth-topics)
- Guide to Community Prevention Services: http://www.thecommunityguide.org/
- Health Data: www.healthdata.gov
- MENTOR – National Mentoring Partnership: www.mentoring.org
  Elements of Effective Practice for Mentoring:

19 See http://www.liveworkthrive.org/site/assets/docs/Mobility-Mentoring-Brief-EBabcock-0509121.pdf.

- **National Institute for Out of School Time programming:** https://www.niost.org/ After school quality guides, APT & SAYO training
- NREPP SAMHSA National Registry of Evidence-Based Programs and Practices (http://www.nrepp.samhsa.gov/)
- OJJDP Model Programs Guide: https://www.ojjdp.gov/mpg
- Office of Juvenile Justice and Delinquency Prevention (OJJDP) Model Program (http://www.ojjdp.gov/mpg/)
- Promising Practices Network (http://www.promisingpractices.net/)
- **Ready by 21 programming and toolkits:** http://www.readyby21.org/Social Programs that Work-Coalition for Evidence-Based Policy (http://evidencebasedprograms.org/)
- Social Programs that Work: http://www.evidencebasedprograms.org/
- **Berkshire Benchmarks:** Data Clearinghouse: http://www.berkshirebenchmarks.org/data/
- **Federal Reserve Bank of St. Louis: Workforce Development Intersection with Economic Development:**
  Changing the labor market prospects for disadvantaged workers requires strategies that cut across welfare, job training, education, human services and economic development systems. Strategies must both prepare the worker and create the conditions where that worker’s success is attainable. (Annie E. Casey Foundation)

Workforce development from the societal centric perspective includes initiatives that educate and train individuals to meet the needs of current and future business and industry in order to maintain a sustainable competitive economic environment. (Federal Reserve Bank of St. Louis)

- **MA Work Based Learning Plan:** http://skillspages.com/masswbl/
- **MIT Living Wage Calculator:** http://livingwage.mit.edu/counties/25003