



**UNITED WAY OF GREATER CHARLOTTESVILLE  
INCLUSIVE EXCELLENCE DIVERSITY, EQUITY, &  
INCLUSION PLAN**

## Introduction

The United Way of Greater Charlottesville is committed to integrating diversity, equity and inclusion into the very core of our organization, including our hiring processes, our service and funding programs, and our administrative structures and practices.

The Inclusive Excellence Framework for undertaking diversity, equity and inclusion planning and implementation was developed in 2005 by the Association of American Colleges and Universities. It was then adapted and broadened to support nonprofit and for-profit organizations in Columbia, Missouri and beyond by Dr. Kevin McDonald, currently the Vice President of Diversity, Equity, Inclusion & Community Partnerships for the University of Virginia. This framework has since been adopted by the University of Virginia and the Commonwealth of Virginia (ONE Virginia). Dr. McDonald agreed to chair the Diversity, Equity & Inclusion Committee at the United Way of Greater Charlottesville tasked with developing this United Way of Greater Charlottesville Diversity, Equity & Inclusion Plan using the Inclusive Excellence framework. This plan is being undertaken as part of the United Way's FY21-26 Strategic Plan's five pillars of action. This includes changing the United Way's organizational culture around diversity, equity and inclusion internally, becoming an advocate for equity in our community, and strengthening partnerships that support the equity framework.

Appendix A includes the Five-Year Strategic Plan which lays out the primary Financial Stability and School Readiness Five-Year Goals with an equity focus.

## Framework

The goal of Inclusive Excellence is to embed diversity, equity, and inclusion into the organizational fabric to better achieve organizational outcomes and realize the benefits of diversity. It is designed as a comprehensive but flexible structure for engaged, intentional, and systemic self-study across all areas of organizational functioning. Once a functional area or an organization/school/department has studied their areas of strength and their areas of strategic opportunity, specific priorities are named in each dimension that are accompanied by action plans with measurable results.

The United Way will steer employees, board members and collaborating partners through each dimension of the framework in order to achieve excellence. The framework is composed of five scalable dimensions and consists of understanding and adopting the principles of community. The dimensions include:

1. Access & Success

This dimension refers to the compositional diversity among our constituent groups and their context-specific outcomes or benefits gained from their relationships with the organization. Processes like recruitment, retention, development and long-term outcomes are the key focus of this dimension.

2. Climate + Intergroup Relations

This dimension refers to what it feels like to individuals to be here, and the behavioral norms and experiences that are present. Effective and innovative cultures depend on individuals feeling comfortable to take interpersonal risks and to bring their whole selves to their work and learning. Measuring constituent perceptions related to feeling respected belonging, and prevalence of affirming relationships with peers and organizational administration are among the concepts present in this dimension.

### 3. Education & Training

This dimension relates to the ways in which education and training for those in the organization (and learning/modeling engagement with the public) contribute to community engagement, service, inclusion, equity, and social justice. Programs and processes in this dimension include intentionally designed learning programs as well as targeted professional development activities that promote intercultural awareness and competence relevant to the mission of the organization.

### 4. Infrastructure & Investment

This dimension refers to the policies, resources, organizational and communication structures, and performance measures that inform and enable an intentionally inclusive, equitable, and innovative organization.

### 5. Community & Partnership

This dimension refers to how place-based organizations engage reciprocally and in a participatory way with our surrounding neighborhoods, counties, and state. Specifically, how the organization understands and tracks their impacts in terms of the financial and social well-being of the communities and partners with which they are engaged.

## Goals

The IE framework is designed as a comprehensive but flexible structure for engaged, intentional, and systemic self-study across all areas of organizational functioning. Once a functional area or an organization or department has studied their areas of strength and their areas of strategic opportunity, specific priorities or goals are named in each dimension that are accompanied by action plans with measurable results. The United Way of Greater Charlottesville has identified the goals within each of the dimensions as follows:

#### **Access & Success:**

**Goal #1** – Increase the percentage of economically disadvantaged and Black Kindergarteners meeting literacy and other available benchmarks for school readiness by 10%.

**Goal #2** – Reduce poverty for economically disadvantaged and Black head-of-household families in the planning district by increasing wages to a survival income as defined by the Orange Dot 4.0 Report (\$45,000 per year for a household of 2).

#### **Climate & Intergroup Relations:**

**Goal** – Develop an organizational culture that builds our capacity to advocate for equity in our community.

**Education & Training:**

**Goal #1** – Develop staff capacity for equity advocacy.

**Goal #2** – Provide learning opportunities for staff, partners and community members.

**Infrastructure & Investment:**

**Goal #1** – Increase UWGC’s capacity to serve as a backbone organization in impact areas through data and convening of stakeholders, specifically in the area of data accessibility and cross agency collaboration.

**Goal #2** – Strengthen operational excellence to meet the DEI goals outlined in this framework.

**Community & Partnership**

**Goal** – By 2026 UWGC will increase the number of and / or redesign existing partnerships to support our impact areas.

## Communication Plan

**Continued Community Work**

We will communicate this IE plan first and foremost through the work that we do at the United Way through our grantmaking and initiatives, and with our local partners. The most important thing is that we continue to promote genuine and authentic equity through the work that we’re doing and how we’re shaping our organizational culture both internally and externally.

**Leverage Existing Channels**

From there we will continue to market as we have our other programs and initiatives, through existing channels and with authentic and approachable voices. The implementation of the IE plan will be woven into our overall marketing strategy. We won’t dedicate extra or external space to celebrating what should be a part of our organizational culture, anyway, as that is disingenuous. We will call out moments that attribute to particular pillars, but more than anything the execution of the plan will come through in the content that we produce and the community-based impact work that we do.

**Weave Into Content & Organizational Practices**

This content will be present on our website and social media channels in the form of images and videos. It will live in the community in various print forms, as well as via our podcast, *Uncommon Voices*. It should also be reflected in our internal hiring and promotion practices, as well as board appointments.

## Goals, Actions, Measures, and Implementation Plan

This Inclusive Communities plan leverages United Way of Greater Charlottesville’s role as a funder of services and as a community partner/convenor. UWGC engages equity in two primary areas: school readiness and financial stability.\* This planning document charts the work we will undertake in the next three years, ensuring alignment with the 5-Year Strategic Goals adopted for FY2022-FY2026.

\*The current School Readiness and Financial Stability Impact Charters are included as Appendix B for further information regarding the Impact Areas.

Access + Success		Vision: Address the root causes of generational poverty and enable individuals and families to pursue financial stability and achieve their potential.		
Goal 1: Increase the percentage of economically disadvantaged and Black Kindergarteners meeting literacy and other available benchmarks for school readiness by 10%.				
Actions	Outcomes	Timeframe(s)	Responsible Office/ Position	Funding/ Resource Allocation
Work with the Charlottesville-Albemarle Early Education Task Force and Vision Keeper’s leadership to align the EETF workplan with the United Way’s 5-year School Readiness Goals; and, to include an equity framework within the Task Force workplan.	<p><u>Outcomes:</u> Kindergarten benchmarks increase by 10% for economically disadvantaged and Black children</p> <p><u>Outputs:</u> Documented work plans and progress reports</p>	FY21 & FY22	VP of Community Impact, School Readiness Manager	Cost of staff time
<p>Development an equity-based public preschool &amp; private childcare coordinated enrollment process to include a community early childhood website, an online application process, a system to track comprehensive service referrals, and hiring of a Navigator to manage the public preschool application processes annually.(Go2Grow)</p> <p>Develop an equity framework for the project and subsequent program for the VA Department of Education to use statewide.</p>	<p><u>Outcomes:</u> Primary outcome to provide access to all parents with the focus on parent choice to best serve families’ needs. Increase school readiness for more children under the age of 5.</p> <p><u>Outputs:</u> Increasing efficiency, reaching more families, filling programs and improving utilization of state funding.</p>	February 2021-website, application process Ongoing- implement & continue data tracking	VP of Community Impact, School Readiness Manager, Data Analyst	VA Early Childhood Foundation, UWGC
Create Early Learners Scholarship Program Review Committee, including parent and provider representation, to review program design and	<u>Outcomes:</u> Program participants and early education providers report their inputs integrated in program design and evaluation	Fall FY22	VP of Community Impact, School Readiness Manager, School	n/a

<p>evaluation to assist staff in recommending program revisions.</p>	<p><u>Outputs:</u> Number of meetings</p> <p>Documentation of parent and provider participation.</p> <p>Documentation of how parent and provider input has been integrated into program design and evaluation</p>		<p>Readiness Coordinator</p>	
<p><b>Goal 2: In collaboration with community partners, reduce poverty for 1800 economically disadvantaged families by increasing their income to at least the survival income as defined by the Orange Dot 4.0 Report (footnote). Decrease income disparities for 133 Black head-of-household families ensuring their earned income is at least \$45,000 for a household of 2 as defined by Orange Dot 4.0.</b></p>				
<p><b>Actions</b></p>	<p><b>Outcomes (Deliverable/Data/Metric)</b></p>	<p><b>Timeframe(s)</b></p>	<p><b>Responsible Office/ Position</b></p>	<p><b>Funding/ Resource Allocation</b></p>
<p>In collaboration with partners, use small grants and loan programs to increase affordable capital for minority-owned businesses.</p>	<p><u>Outcome:</u> How many minority-owned businesses, or what dollar amount annually or over the 5-year period? Or how many economically disadvantaged or Black head-of-household employees earning survival income?</p> <p><u>Outputs:</u> Average size of grants and loans.</p> <p>Number of partnerships with banks, foundations, other funders.</p> <p>Documentation of processes and use of Financial Resiliency Matrix Tool.</p>	<p>Annual program FY21-FY26</p>	<p>VP Community Impact, Data Analyst</p>	<p>Source of grants &amp; loan programs:</p> <p>MBA partnership: UWGC: \$150,000 per year + cost of staff</p>
<p>Provide affordable auto loans and vehicles through Driving Lives Forward program</p>	<p><u>Outcomes:</u> Number of economically disadvantaged and Black head-of-household people able to maintain employment with a survival income.</p>	<p>Annually thru FY2026</p>	<p>VP of Community Impact, Financial Stability Manager, Financial Stability</p>	<p>UWGC: \$125,000 per year + cost of staff</p>

	<p><u>Outputs:</u> Number of loans made. Number of families/individuals participating in the program. # of refinances that lower interest rate, # of jobs attained or saved</p>		Assistant, Data Analyst	
Collaborate with financial stability partners to provide quality subsidized childcare for those participating in workforce development or training programs	<p><u>Outcomes:</u> Increased Black head-of-household and economically disadvantaged family income</p> <p><u>Outputs:</u> Number of families provided childcare subsidies</p> <p>Number of partners/funders</p> <p>Funds spent on subsidies</p>	Annually thru FY2026	VP of Community Impact, Financial Stability Manager, School Readiness Manager, School Readiness Coordinator, Data Analyst	UWGC: Network2Work-MOU for 10 scholarships = \$115,000 per year + cost of staff
Scale the Family Investment Program to serve 20 families per year	<p><u>Outcomes:</u> Increased family income Serve 20 economically disadvantaged and Black head-of-household families per year Increased access to capital</p> <p>Families move up the Resiliency Matrix</p> <p><u>Outputs:</u> Improved efficiencies in processes and information management.</p> <p>Completion of equity review</p>	Annually thru FY2026	VP of Community Impact, Financial Stability Manager, Financial Stability Assistant, Data Analyst	UWGC: \$200,000 per year
Created Financial Resiliency Task Force (FRTF) vision and strategies; identified outcomes and metrics. Create FRTF work plan with specific goals that address the outcomes and allow for metrics to measure progress	<p><u>Outcomes:</u> Number of economically disadvantaged and Black head-of-household families collectively served that are able to maintain employment with a survival income as defined by Orange Dot 4.0 Report.</p>	Annually commencing July 2021	VP of Community Impact, Financial Stability Manager, Data Analyst	Cost of staff, potential cost of data roll-up

	<p><u>Outputs:</u> Documentation of continued coordination among Task Force organizations.</p> <p>Annual reports on work plan progress.</p>			
Mandate client participation in program development, oversight, and evaluation to ensure policies, programs and procedures are equitable	<p><u>Outcomes:</u> # of participants that are economically disadvantaged and/or Black; # of participants that participate, Other?</p> <p><u>Outputs:</u> Number of meetings</p> <p>Documentation of how client voice is gathered and integrated</p>	Summer FY22	VP of Community Impact, Financial Stability and School Readiness Managers, Coordinators Assistants	Cost of staff, cost of participation
Administer the Charlottesville Tax Aid program to increase average annual income of residents	<p><u>Outcome:</u> Increase adjusted gross income through refunds and free service.</p> <p>Reduce number of balance due returns.</p> <p><u>Outputs:</u> Increase returns filed by 3% annually. Add data points to include race/ethnicity in order to properly disaggregate data and measure progress.</p> <p>Documentation of equity review of program.</p>	Annually	Financial Stability Manager, Financial Stability Assistant, Data Analyst	Cost of staff
Fully implement automobile loan program to include partner agencies, auto donations, and auto repair program	<p><u>Outcomes:</u> Increased family income</p> <p><u>Outputs:</u> Number of participating families</p>	<u>FY2022</u>	VP of Community Impact, Financial Stability Manager, Financial Stability	\$92,000 per year + cost of staff

	Number of loans made  Disaggregated data		Assistant, Data Analyst	
--	--	--	-------------------------	--

<b>Climate + Intergroup Relations</b>		<b>Vision: Change the United Way's organizational culture around diversity, equity, and inclusion internally and be an advocate for equity in our community.</b>		
<b>Goal 1: Develop an organizational culture that builds our capacity to advocate for equity in our community</b>				
<b>Actions</b>	<b>Outcomes (Deliverable/Data/Metric)</b>	<b>Timeframe(s)</b>	<b>Responsible Office/ Position</b>	<b>Funding/ Resource Allocation</b>
Establish DEI Committee and define charter and goals	<u>Outcomes:</u> Changes in programs, policies, and programs resulting from equity reviews by DEI Committee  <u>Outputs:</u> Documentation of DEI committee formation and operations.  Documentation of outcomes from the work of the DEI Committee		President	
Solidify our platform and create understanding of UWGC place in the community equity landscape	<u>Outcomes:</u> UWGC is seen as a trusted partner in equity work in the community  <u>Outputs:</u> Completed Inclusive Communities plan  Documentation of partnership in equity work across emphasis areas		President & Leadership Staff	

<p>Deploy appropriate elements of United Way Worldwide DEI toolkit</p>	<p><u>Outcomes:</u> UWGC capacity for equity work is acknowledged in the community</p> <p>Outcomes from changes made from the toolkit</p> <p><u>Outputs:</u> DEI skills and capacities defined for staff and UWGC</p> <p>Number of elements implemented</p>		<p>President, Chief of Staff, DEI Coordinator</p>	
--	---	--	---	--

Education + Training		Vision: Strengthen the capacity of the United Way to effectively communicate with clients, funders, and the community at large and to be an advocate for equity in our community.		
Goal 1: Develop staff capacity for advancing equity to create a platform where broader knowledge of the need for equity is developed within the organization in order to impact the broader community.				
Actions	Outcomes	Timeframe(s)	Responsible Office/ Position	Funding/ Resource Allocation
Provide high-quality professional development in DEI advocacy	<p><u>Outcomes:</u> Staff report more comfort and skill in having equity related conversations</p> <p>Clients providers, partners, and other stakeholders report DEI competency as a key strength of UWGC staff</p> <p><u>Outputs:</u> Inventory of development opportunities mapped to identified competencies and learning needs</p> <p>Participation in development opportunities</p>		President, Chief of Staff, DEI Coordinator	
Survey clients, funders, and the community on effective communication and equity advocacy	<p><u>Outcomes:</u> Clients providers, partners, and other stakeholders report DEI competency as a key strength of UWGC staff</p> <p><u>Outputs:</u> Administration of and reporting on survey</p>		Chief of Staff, DEI Coordinator	
Goal 2: Provide learning opportunities for partners and community members				
Actions	Outcomes	Timeframe(s)	Responsible Office/ Position	Funding/ Resource Allocation
Uncommon Voices Podcast to elevate untold stories in the Charlottesville community	<p><u>Outcomes:</u> Elevated voices from marginalized communities</p> <p><u>Outputs:</u> Number of podcasts</p> <p>Online engagement</p>		Director of Marketing	

Host Community Tables	<p><u>Outcomes:</u> Feedback from Community Table participants</p> <p>Actions taken resulting from Community Table conversations</p> <p><u>Outputs:</u> Number of events held</p> <p>Inventory of topics</p>		Vice President of Community Engagement	

Infrastructure + Investment		Vision: Strengthen impact areas to meet community need with operational excellence and ensure sustainable funding for our work.		
Goal: Increase UWGC's capacity to serve as backbone organization in impact areas through data and convening of stakeholders, specifically in the area of data accessibility and cross agency collaboration.				
Actions	Outcomes	Timeframe(s)	Responsible Office/ Position	Funding/ Resource Allocation
Participate in the creation of an Early Childhood Education data dashboard available to all stakeholders	<u>Outcomes:</u> Stakeholders use dashboard to inform decision-making and planning <u>Outputs:</u> Accessible dashboard with key indicators disaggregated by race/ethnicity, and income	FY2022	VP of Community Impact, Data Analyst, School Readiness Manager	Cost of Staff Time
Created Financial Resiliency Task Force vision, mission, goals/strategies; identify outcomes/metrics	<u>Outputs:</u> FRTC charter with plan, identified outcomes and metrics	FY21	VP of Community Impact	Cost of staff time
Serve as backbone organization for FRTC	<u>Outcomes:</u> Stakeholders rely on UWGC for support and coordination of task force activity <u>Outputs:</u> Documented activities to develop collective impact capacity among members of the task force	Annually	VP of Community Impact	Cost of staff time
Redesign Impact grant award process	<u>Outcome:</u> Provide fewer but larger and higher impact grants focused on strategic priorities <u>Outputs:</u> Documentation of revised process using an equity lens	FY22	VP of Community Impact	Cost of staff time
Add database management to facilitate tracking/reporting for Family Investment Program, Driving Lives Forward and Early Learners Scholarship Program	<u>Outcomes:</u> Stakeholders use data to improve services and track family progress <u>Outputs:</u> Evaluation of impact of data use on program outcomes	pending approval	VP of Community Impact	\$1,798

Goal 2: Strengthen UWGC's operational position to meet the DEI goals outlined in this framework				
Actions	Outcomes	Timeframe(s)	Responsible Office/ Position	Funding/ Resource Allocation
Streamline grant-making process and embed metrics/outcomes reporting	<p><u>Outcomes:</u> Redesigned grant-making process and workflow for agencies</p> <p><u>Outputs:</u> Documented guidance on metrics and reporting requirements</p>	FY22	VP of Community Impact, Data Analyst	Cost of staff time
Implement recommendations from DEI Committee, FRTF, and VECF using the Inclusive Excellence framework to reduce disparities and promote anti-racism in all impact areas.	<p><u>Outcomes:</u> Equity lens becomes a centerpiece of UWGC's approach to its work</p> <p><u>Outputs:</u> Changes in programs, policies, and programs resulting from equity reviews</p> <p>Documentation of recommendations implemented, justification for those recommendations not implemented</p>	FY21, FY22	All staff	Cost of staff time, consultant cost

Community + Partnership		Vision: Strengthen partnerships that support our equity framework and impact areas and establish United Way as a hub for community data collection around service delivery in financial stability and school readiness to improve access to data for all partners and to inform investments (ROI).		
Goal: By 2026 UWGC will increase the number of and/or redesign existing partnerships to support our Financial Stability and School Readiness impact areas				
Actions	Outcomes (Deliverable/Data/Metric)	Timeframe(s)	Responsible Office/ Position	Funding/ Resource Allocation
Explore participation in collaboration with agencies to develop a Financial Opportunity Center (FOC)	<p><u>Outcomes:</u> Successful launch of FOC</p> <p><u>Outputs:</u> Number of partnerships created and/or redesigned</p> <p>Inventory or partnerships</p>	FY21	President, VP of Community Impact	\$25,000 per year for 3 years, cost of staff time

<p>Grow Day of Caring to include UVA sponsorship and annual engagement- 10% increase new projects</p>	<p><u>Outcomes:</u> Community projects completed</p> <p>Volunteer carry-over to year-round community service</p> <p><u>Outputs:</u> # of projects funded</p> <p>Number of new projects</p>	<p>FY21, FY22</p>	<p>VP of Community Engagement, Community Outreach Coordinator</p>	
---	--	-------------------	---	--

## Appendix A – Strategic Plan

### Strategic High-Level Five-Year Goals

FY2021-2026

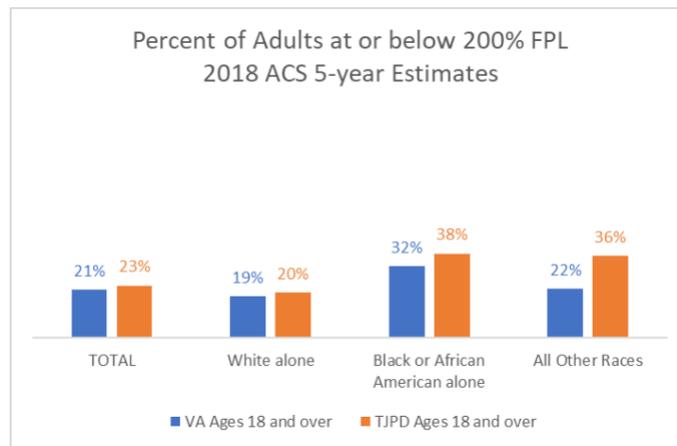
The United Way of Greater Charlottesville is committed to work that breaks the cycle of generational poverty and improves outcomes in our community. As we look ahead to the future, we have identified five pillars of action that will facilitate our success. Our strategic high-level five-year goals are drafted to align with these five pillars of action, as directed by our 2020 strategic plan:

- Strengthen **impact areas** to improve operational excellence to better meet community needs;
- Establish United Way as a hub for community **data collection** around financial stability and school readiness;
- Change the United Way’s organizational culture around **Diversity, Equity and Inclusion** internally and be an advocate for equity in our community;
- Strengthen **partnerships** that support our equity framework and Impact Areas; and
- Ensure sustainable **funding** for our work, supported by effective **communication** with clients, funders, and the community at-large.

What came to light during our strategic planning process is a more focused and intentional plan to carry out our mission of connecting the community and enabling individuals and families to achieve their potential while supporting a strong equitable planning district where every person thrives. **The Five-Year Goals are structured to support these organizational goals in our Impact Areas through the following programs:**

- School Readiness - Early Learner Scholarships, Early Education Task Force, Early Education Symposium, Smart Beginnings, Children’s Data Consortium, Soho Center Book Program, and Impact Grants
- Financial Stability - Family Investment Program, Cville Tax Aid, Santa Fund for School Kids, Driving Lives Forward Auto Loan Program, Financial Resilience Task Force, and Impact Grants
- Connected Community – Day of Caring, Women United, Community Engagement Events,

Census Bureau data demonstrates that the poverty rate in the Thomas Jefferson Planning District has largely remained the same since 2013, despite strong regional economic growth and one of the lowest unemployment rates in the state. More than 20% of the families, or 12,035, fall within 200% of the federal poverty line, resulting in 30% of the children in the planning district eligible for free or reduced lunch at school.



Poverty disproportionately impacts black and brown individuals:

- In 2017, 25,494 families lived in Albemarle County. 85.5% of those families identified as White, 8% as Black, and 4.7% as Latino. 1,657, or 6.5% of the families lived below the poverty line. Only 5.6% of those living below the poverty line were White; however, 14.8% were Black, and 20.5% were Latino.
- In Charlottesville, there 8,433 families in 2017. 72.3% identified as White, 21.3% as Black, and 5.0% as Latino. 582, or 6.9% of the families lived below the poverty line. Only 6.9% of those living below the poverty line were White, however 23.9% were Black and 10.9% were Latino.

These families struggle to meet basic needs, and without the right interventions and support, poverty passes on to the next generation. The issue of poverty goes beyond a lack of financial resources and impedes a family’s ability to move forward, leading to myriad challenges such as unstable and unaffordable housing, unemployment, lack of quality childcare, lack of transportation, food insecurity, and incarceration. Due to the racism inherent in our systems of education, banking, housing, healthcare, and justice, people of color do not have an equitable opportunity for success. Local small business owners or entrepreneurs, especially minority-owned businesses, often do not have equitable access to capital.

U.S. school systems expect that children arrive at kindergarten ready to learn to read. By 3<sup>rd</sup> grade, they are expected to be able to read to learn. However, children living in or near poverty are more likely to arrive at kindergarten as much as 2 years behind their peers. By 3<sup>rd</sup> grade, they are unable to read to learn and the achievement gap becomes permanent. As with adults, Poverty also impacts black and brown children disproportionately than white, as well as economically disadvantaged children more than non-economically disadvantaged children:

- In SY15-16, 25.8% of City Black, 25% of Latino, and 23% of economically disadvantaged kindergarteners required literacy interventions. Only 4.7% of White and 3% of non-economically disadvantaged kindergarteners required the same.
- In SY17-18, 61.6% of City Black, 39% of Latino, and 54.6% of economically disadvantaged third graders failed the 3<sup>rd</sup> Grade Reading SOL. Only 12.1% of White and 11% of non-economically- disadvantaged students failed.
- In SY17-18, 67.4% of City Black, 34.2% of Latino, and 55.2% of economically disadvantaged third graders failed the 3<sup>rd</sup> Grade Math SOL. Only 11.3% of White and 11.6% of non-economically disadvantaged students failed.

However, school systems are not structured or adequately funded to support a child arriving at school with a two-year learning deficit. We need to increase the support system that allows economically disadvantaged children under the age of five to compete successfully on kindergarten literacy benchmark testing through quality education interventions.

## **Goals and Approach**

The over-arching goal is to eliminate barriers for minority and economically disadvantaged populations and enable them to achieve financial stability and thrive economically. This may be achieved through coordinated service delivery among peer agencies supported by task force coalitions focused on the long-term systems-level change. Through this, we may begin to eliminate a dependency on these services such that individuals can thrive economically and become financially stable.

## Five-Year Strategic Goals

### *Committed to work that breaks the cycle of generational poverty and improves outcomes in our community*

#### **A. Financial Stability**

By 2027 reduce poverty in the planning district by 15% by lifting 1800 families above earning “survival income” threshold as defined by the Orange Dot 4.0 report.

Specifically, assist 133 Black head-of-household families to increase earnings above the “survival income” threshold.

- Strategies:
  - Increase access to assets for minority-owned business through small grant and loans programs.
  - Provide affordable auto loans and vehicles through the Driving Lives Forward program launched in spring 2020.
  - Design two-three-year financial plans that are driven by individual accountability to scale economically measured by an increase in credit score and income via scaling the Family Investment Program to have served 75 families by the end of 2026.
  - Focus on workforce development through subsidized childcare with quality local providers.
  - Develop data model that measures community need by income bands, education and job training access for increase in wage earning, credit score tracking and debt reduction.
  - Align grantmaking program with partners who meet community priorities established by the Financial Resiliency Task Force.
  - Include client voice in program development, oversight and evaluation.
  - Launch and coordinate the FRTF to provide backup support and coordination for systems-level financial resiliency work in the community.
  - Administer the Cville Tax Aid program to support access to the Earned Income Tax Credit and other credits, thereby increasing average annual income of participants.

#### **B. School Readiness**

By 2027 increase the number of economically disadvantaged kindergartners who pass literacy benchmarks by 10%. By 2027, 76.8% of economically disadvantaged kindergartners should be meeting Fall Kindergarten PALS benchmarks.

Specifically, increase the number of Black kindergartners in Charlottesville and Albemarle who meet literacy benchmarks by 10%. By 2027, 83.4% of Black kindergartners should be meeting Fall Kindergarten PALS benchmarks.

- Strategies:
  - Develop a coordinated preschool enrollment program in Charlottesville and Albemarle that provides parents access that best fits their personal needs

- Develop data dashboards that can be shared with MOU partners, community agencies, and the funding community using the Children's Data Consortium to establish baseline disaggregated data that supports early learning interventions
- Align grantmaking program with partners who meet community priorities established by the Early Education Task Force
- Create incentive program for parents to use quality childcare providers through increased subsidy opportunities with the Early Learner Scholarship Program
- Include parent voice in program development, oversight and evaluation
- Increase # of 4's in high quality preschool, increase # of 3's in high quality pre-school
- Backup support, coordination and leadership of EETF to support EETF goals of increasing access to quality in early childhood eco-system. Administer expanded mixed, preschool development, single point-of-entry, training opportunities, and family engagement

## Appendix B – Impact Charters



### Financial Stability Impact Area

#### FY21 Charter

##### Vision

A strong, equitable community where every family thrives.

##### Mission

The United Way of Greater Charlottesville connects our community, enabling individuals and families to achieve their potential.

##### Goal

Our over-arching goal is to identify and comprehensively eliminate barriers for economically disadvantaged members of our Greater Charlottesville community, many of whom are people of color, enabling them to achieve financial stability and ultimately thrive economically. We will work for systems level change by convening and coordinating with our non-profit and government agency partners to efficiently deliver services.

##### Five-Year Financial Stability Goals

By 2026, reduce poverty in the planning district by 15% for families earning less than 200% of the federal poverty level, or 1,805 families. In addition, due to the disparities associated with long-term systemic racism, within this goal:

- Reduce poverty by 15% among Black head-of-household families living in poverty, or at or below 100% of the federal poverty level, in Albemarle and Charlottesville. Specifically, assist 133 Black head-of-household families increase their annual household income so it exceeds the federal poverty level.
- Decrease income disparities for 25% of these Black households by ensuring their earned income is at least 200% of the federal poverty level. Individual family income goals will be calculated as follows: entry income x .25, and at least \$34,480 (for family of 2), \$43,440 (for family of 3), or \$52,400 (for family of 4).

##### Situation

Local data inform the Financial Stability Impact Area focus:

- Statistics indicate that 39,529 individuals in our Planning District live near and in poverty (<125% of the Federal Poverty Level). Out of the six localities, 63%, or 25,049 of those who earn less than 125% of FPL live in Charlottesville/Albemarle.<sup>1</sup>
- In 2018, the estimated annual cost of basic needs in Charlottesville/Albemarle, including costs associated with working, was \$45,184.<sup>2</sup>
- A family of 4 (with one toddler) earning 125% of FPL, or \$31,375 per year, incurs an annual deficit of **\$13,809**. The same family, if living in poverty and earning 100% of FPL, or \$25,100, has an annual deficit of **\$20,084**. For the 25,049 residents in Charlottesville/Albemarle who earn less than 125% of FPL, the collective minimum annual deficit totals **\$345,901,641**.
- The planning district's poverty rate has improved only 0.9% over five years. 25,049 of the 26,165 Charlottesville/Albemarle residents counted in 2014 still live in or near poverty in 2019.

- In 2016, the median household income by race for white households in Albemarle County was \$73.4K, while for African-American households was \$47.3K. In the City of Charlottesville for the same period, median household income by race for white households was \$60K, while for African-American households \$26.6K. Median household income for white households was 55% greater than African-American households in the County, and 125.5% greater than African-American households in the City.<sup>3</sup>
- The Centers for Disease Control report that poverty is a key social determinant indicator of population health; further stating that zip code can account for as much as 50% of an individual’s health status. On average, health care accounts for less than 20% of an individual’s health status, while indicators such as poverty, living conditions, housing, environmental safety and behavior account for as much as 80%.<sup>4</sup>
- In 2017, **25,494** families lived in Albemarle County. 85.5% of those families identified as White, 8% as Black, and 4.7% as Latino. **1,657**, or 6.5% of the families lived below the poverty line. Only 5.6% of those living below the poverty line were White; however, **14.8%** were Black, and **20.5%** were Latino.<sup>1</sup>
- In Charlottesville, there **8,433** families in 2017. 72.3% identified as White, 21.3% as Black, and 5.0% as Latino. **582**, or 6.9% of the families lived below the poverty line. Only 6.9% of those living below the poverty line were White, however **23.9%** were Black and **10.9%** were Latino.<sup>1</sup>

### **FY20/21 Focus**

Our goal is to help adults who are on the path to becoming financially stable and economically independent by supporting customized, holistic solutions that address obstacles encountered along the way. The following organizational strategies will be deployed and UWGC may use its funding across one or more of them to address the local situation:

1. Increase access to assets for minority-owned business through small grant and loans programs.
2. Provide affordable auto loans and vehicles through the Driving Lives Forward program launched in spring 2020.
3. Design two-to-three year financial plans that are driven by individual accountability to scale economically measured by an increase in credit score and income via scaling the Family Investment Program to have served 75 families by the end of 2026.
4. Focus on workforce development and training opportunities by providing subsidized childcare with quality local providers via collaboration with financial stability partners.
5. Develop a data model that measures community need by income bands, education and job training access for increase in wage earning, credit score tracking and debt reduction.
6. Align grantmaking program with partners who meet community priorities established by the Financial Resiliency Task Force as well as the UWGC 5-year goals. In FY21, the Financial Stability Impact Area will continue to fund the two multi-year (3 years) \$30,000 grants awarded in FY20. Two one-year \$25,000 grants will be available to award in FY21 for the period July 1, 2021-June 30, 2022.
7. Include client voice in program development, oversight and evaluation and ensure all policies, programs and procedures are inclusive and anti-racist.
8. Launch and coordinate the FRTF to provide backbone support and coordination for systems-level financial resiliency work in the community.
9. Administer the Cville Tax Aid program to support access to the Earned Income Tax Credit and other refunds, thereby increasing average annual income of participants.
10. Implement recommendations of the UWGC DEI Committee and VECF using the Inclusive Excellence framework to diminish disparities and promote anti-racism in all areas of the school readiness impact work.

### **Key grant-making strategies:**

Grant applicants will be required to align with at least one of the following key financial stability strategies and demonstrate alignment with the Financial Stability 5 Year Strategic Goals:

- Financial literacy & asset-building for adults
- Employment and improved-employment pathways for adults

- Work supports for adults (transportation, etc.)

Funding preferences may be established to continue work with partner agencies and organizations that will create community-level impact that will positively impact the strategic five year goals. These funds may be deployed to continue “backbone” management of partnerships, or to fund work in partnership with local agencies, coalitions or task forces.

**Preferred grant-making outcomes:**

Grant applications must measure at least two (2) of the following preferred outcomes. Applicants may add up to two (2) of their own outcome measurements. Outcomes should be disaggregated by race and ethnicity. Disaggregated data will be mandatory for the FY23 grant cycle. Preference will be given to programs whose outcomes demonstrate progress towards the United Way’s Five-Year Financial Stability goals.

**Short-term:**

- Total # of adult participants and # who became employed with a wage of greater than 100% FPL but less than 150% FPL
- Total # of adult participants and # who became employed with a wage greater than 150% FPL
- Total # of adult/family participants and # who increased savings over the course of 12 months
- Total # of adult/family participants and # that received financial coaching for a minimum of 6 months
- Total # of adult/family participants and # that acquired or purchased a financial asset with a net value >\$500, >\$1,000, >\$5,000
- Total # of adult participants and # that completed a job training program
- Total # of adult/family participants and # who reported improved financial skills/knowledge/abilities
- Total # of adult/family participants and # who reduced >\$1,000 of debt by at least 15%
- Total # of adult/family participants and # who reduced household expenses by more than \$200/month
- Total # of adult participants and # who established a credit score
- Total # of adult participants and # who improved a credit score by 50+ points
- Total # of adult/family participants and # who established a family budget
- Total # of adult participants and # who became employed
- Total # of adult participants and # who established an achievable action plan to move to family-sustaining wages
- Total # of adult/family participants and # who resolved transportation barriers to employment
- Total # of adult/family participants and # who solved a childcare barrier
- Total # of adult/family participants and # who moved children from childcare to quality early care & education
- Total # of adult participants and # who acquired certifications or licenses required for employment
- Total # of client participants and # who started new businesses
- Total # of client participants and # who created new jobs within their businesses
- Current dollar value of payroll reported by current or past clients

**Longer-term:**

- Total # of adult participants and # who became employed with a wage greater than 150% FPL but less than 200% FPL
- Total # of adult participants and # who became employed with a wage equal to or exceeding 200% FPL
- Total # of adult/family participants and # who created, revised and maintained a family budget for at least 6 months
- Total # of adults who participated and # who remained employed for 6 months
- Total # of unduplicated adults who participated and # who remained employed for 12 months
- Total # of unduplicated adult participants and # who remained employed for more than 12 months
- Total # of adult participants and # who became employed with family-sustaining wages
- Total # of adult participants and # who became employed with benefits
- Total # of adult participants and # who created, revised and used a family budget for >2 years
- Total # of adult participants and # who sustained credit score above 650 for >2 years
- Program results in a decrease in outcome disparities by race
- Total # of low-income clients who participated and # who created jobs for themselves (owners’ primary source of income is now the business versus another job)
- Current dollar value of payroll reported by clients in business for three+ years
- Total # of adult/family participants and # who reduced >\$1,000 of debt by at least 50%

Data Sources:

<sup>1</sup>Census Bureau: 2013-2017 American Community Survey estimates, <https://www.census.gov/programs-surveys/acs/data.html>

<sup>2</sup>The Orange Dot 3.0 Report, October 2018,

[https://www.pvcc.edu/sites/default/files/media/orange\\_dot\\_project\\_3.0.2018.online.pdf](https://www.pvcc.edu/sites/default/files/media/orange_dot_project_3.0.2018.online.pdf)

<sup>3</sup>The Statistical Atlas, <https://statisticalatlas.com/about>; based on 2012-2016, 2013-2017 American Community Survey estimates.

<sup>4</sup>Centers for Disease Control (CDC), <https://www.cdc.gov/socialdeterminants/index.htm>

## School Readiness Impact Area

### FY21 Charter

#### Vision

A strong, equitable community where every family thrives.

#### Mission

The United Way of Greater Charlottesville connects our community, enabling individuals and families to achieve their potential.

#### Goals

Our over-arching goal is to identify and comprehensively eliminate barriers for economically disadvantaged members of our Greater Charlottesville community, many of whom are people of color, enabling them to achieve financial stability and ultimately thrive economically. We will work for systems level change by convening and coordinating with our non-profit and government agency partners to efficiently deliver services.

#### Five-Year School Readiness Goals

Within School Readiness, we will also work for systems level change. By 2026, our goal is to:

- Increase the number of Economically Disadvantaged kindergarteners who meet literacy benchmarks (PALS) by 10%. Therefore, 76.8% of Economically Disadvantaged kindergarteners across the Divisions should be meeting Fall Kindergarten PALS benchmarks by Fall 2026.
- Increase the number of Black kindergarteners who meet literacy benchmarks (PALS) by 10%. Therefore, 83.4% of each school years' Black kindergarteners across the Divisions should be meeting Fall Kindergarten PALS benchmarks by Fall 2026.

We will also track 3<sup>rd</sup> grade SOL reading and math performance as they are also key indicators of continuing disparities.

#### Situation

Local data inform the School Readiness Impact Area focus:

- In 2019, significant numbers of children under the age of 18 in our planning district lived in poverty and single parent households. In all but one locality, the data broken out by race indicate substantial disparities exist. Poverty is the leading social determinant of health and an Adverse Childhood Experience impacting a child's ability to succeed in life:<sup>1</sup>

Locality	% in poverty	Single parent	White	Black	Latino
Albemarle	9%	23%	6%	28%	32%
Charlottesville	19%	35%	11%	44%	17%
Fluvanna	9%	24%	6%	3%	n/a
Greene	12%	20%	9%	21%	19%
Louisa	15%	29%	14%	26%	29%
Nelson	21%	46%	21%	35%	5%

- In 2017, 46.9% of single, female-headed households in Charlottesville with children under the age of 5 lived in poverty, while 44.5% of single, female-headed households in Albemarle lived in poverty.
- In 2016, the median household income by race for white households in Albemarle County was \$73.4K, while for African-American households was \$47.3K. In the City of Charlottesville for the same period, median household income by race for white households was \$60K, while for African-American households \$26.6K. Median household income for white households was 55% greater than African-American households in the County, and 125.5% greater than African-American households in the City.<sup>2</sup>
- In 2017, economically disadvantaged kindergartners in Charlottesville were 154% more likely to fail fall kindergarten literacy benchmarks than their non-economically disadvantaged classmates. In Albemarle, economically disadvantaged kindergartners were 135% more likely to fail fall kindergarten literacy benchmarks than their non-economically disadvantaged classmates.<sup>3</sup>
- In SY15-16 (most recent data available), 20 Black Albemarle Kindergarteners and 32 Black Charlottesville Kindergarteners did not achieve the Fall Kindergarten [PALS](#) literacy benchmarks, indicating they did not arrive to school with the necessary literacy skills to be successful. Black Kindergarteners' scores were 69% and 138% lower than their white peers, respectively in the localities.<sup>3</sup>
- In SY16-17 (most recent data available), 62 Albemarle Black 3<sup>rd</sup> graders and 66 Charlottesville 3<sup>rd</sup> graders did not pass [Reading Standards of Learning](#) (SOL) tests (their scores were 89% and 128% lower than their white peers, respectively in the localities); 68 Black Albemarle 3<sup>rd</sup> graders and 76 Black Charlottesville 3<sup>rd</sup> graders did not pass Math SOLs (their scores were 95% and 164% lower than their white peers, respectively in the localities).<sup>3</sup>

### **FY20/21 Focus**

During FY21, the School Readiness Impact Team will invest in strategies using evidence-based and best-practice interventions aimed at healthy child development up to age five that will improve the quality of and access to early education. During FY21, the Team will focus on the following organizational strategies and may use its funding across one or more of them to address the local situation:

1. Develop a coordinated early education enrollment program in Charlottesville and Albemarle that provides parents access that best fits their personal needs.
2. Publish data dashboards that can be shared with MOU partners, community agencies, and the funding community using the Children's Data Consortium to establish baseline disaggregated data that supports early learning interventions
3. Align grantmaking program with partners who meet community priorities established by the Early Education Task Force and the United Way's five-year strategic goals. In FY21, in the School Readiness Impact Area, the one multi-year (3 years) \$40,000 grant awarded in FY20 will continue to be funded. Two one-year \$30,000 grants will be available to be awarded with preference for partners and programs that demonstrate outcomes that support the School Readiness Strategic Goals.
4. Create incentive program for parents to use quality childcare providers through increased subsidy opportunities with the Early Learner Scholarship Program
5. Include parent voice in program development, oversight and evaluation and ensure all policies, programs and procedures are inclusive and anti-racist.
6. Increase # of 4's in high quality prek , increase # of 3's in high quality pre-k (% 85-90 25-50)

7. Backup support, coordination and leadership of EETF to support EETF goals of increasing access to quality in early childhood eco-system. Administer Expanded MD, PDG training opportunities, family engagement.
8. Implement recommendations of the UWGC DEI Committee and VECF using the Inclusive Excellence framework to diminish disparities and promote anti-racism in all areas of the school readiness impact work.
9. Introduce grant-funded programs (Federal Preschool Development Project, Mixed Delivery Program) to outlying counties to encourage systems-level improvements.

**Key grant-making strategies**

UWGC will undertake a grant process to decrease the opportunity gap for at-risk children under age five by accepting proposals that specifically address the factors outlined in the situation above, and that are focused on the key strategies above and the outcomes below. Outcomes should be disaggregated by race and ethnicity. Disaggregated data will be mandatory for the FY23 grant cycle. Preference will be given to programs whose outcomes support progress towards the United Way’s Five-Year School Readiness goals.

**Preferred grant-making outcomes:**

Grant applications will have to measure at least two (2) of the following preferred outcomes. Applicants may add up to two (2) of their own outcome measurements. Preference is given for outcomes that are disaggregated so that progress towards eliminating disparities may be measured.

- Total # of classrooms and # of classrooms improving safety and classroom quality as measured by a standardized assessment
- Total # of children served, # assessed for socio-emotional growth, # referred for additional services
- Total # of children served and # of children assessed for kindergarten readiness as compared to children as evidenced by a standardized assessment
- Total # of teachers/assistants and # receiving professional development resulting in improved CLASS scores (scores must be reported)
- Total # of early childhood education centers in Virginia Quality in the past 24-month period and # that moved at least one level in Virginia Quality (#s by levels and locality)
- Total # of teachers/assistants participating in the CDA certification process, those that completed the process, and those that received the certification
- # of children served and # of children who received services as the result of a developmental screening
- # of children served and # of children who performed at or above age expectancy in one or more domains (supporting data to be provided)

**Data Sources:**

<sup>1</sup>County Health Rankings & Roadmaps, A Robert Wood Johnson Foundation program, <https://www.countyhealthrankings.org/>

<sup>2</sup>The Statistical Atlas, <https://statisticalatlas.com/about>; based on 2012-2016, 2013-2017 American Community Survey estimates. Center for Disease Control (CDC), <https://www.cdc.gov/socialdeterminants/index.htm>

<sup>3</sup>United Way-TJA: 2017 Community Profiles