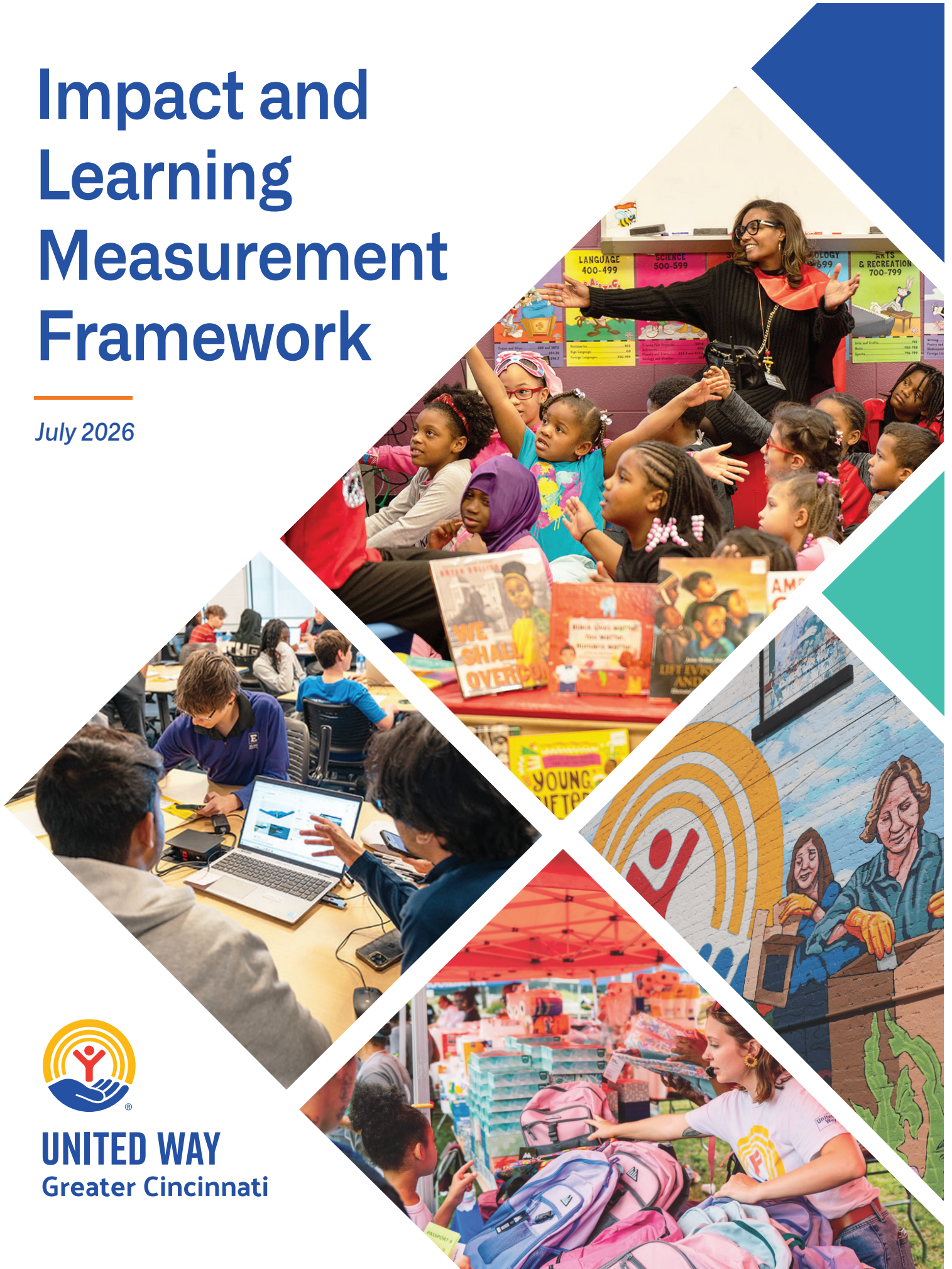


Impact and Learning Measurement Framework

July 2026



UNITED WAY
Greater Cincinnati

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WHY IMPACT & LEARNING MEASUREMENT

At United Way of Greater Cincinnati, we believe measurement is not simply about accountability - it is about learning, improving, and understanding how meaningful change happens across our community.

For more than two decades, United Way has used data, evaluation, and community insights to guide investments, strengthen partnerships, and improve outcomes for families across our region – defined by United Way's nine county **geographic footprint**: Brown, Clermont and Hamilton counties (OH); Boone, Campbell, Grant and Kenton counties (KY); and Dearborn and Ohio counties (IN).

We know that sustainable change requires more than counting services delivered. It requires understanding whether individuals and families are achieving better outcomes, whether organizations and systems are working together more effectively and efficiently, whether systems are becoming more responsive, and, ultimately, whether community conditions and outcomes are improving over time.

We recognize that this work is bigger than the efforts of any one organization. It requires a community of partners and stakeholders working together. As a result, United Way evaluates impact across multiple levels, measuring both direct results and our contributions to stronger systems, partnerships, and community conditions.

This framework serves as a shared approach for understanding impact across United Way initiatives, community investments, collaborative partnerships, advocacy efforts, and civic infrastructure work.

OUR IMPACT PHILOSOPHY

United Way's Impact & Learning Framework is informed by research on economic mobility, collective impact, systems change, and community development. Evidence consistently demonstrates that long-term well-being is shaped by multiple interconnected factors, including education, economic opportunity, housing stability, social capital, and access to supportive systems.

The Urban Institute's Upward Mobility Framework identifies economic success, power and autonomy, dignity and belonging, and community conditions as critical dimensions of upward mobility. Opportunity Insights research around economic and upward mobility (whether a child earns more or less as an adult than their parents did) further demonstrates that community conditions—including neighborhood environment, social networks, and access to opportunity—significantly influence long-term outcomes across generations.

With this understanding, United Way believes that economic well-being and mobility go beyond standard measures of economic success, and families should have the resources to make this possible today and in the future. Where people grow up, their educational opportunities, support networks and local policies all play a role in establishing economic well-being.

Specifically, United Way has identified three **impact areas** that can act as levers for change: **financial empowerment, educational success and housing security**. We believe these pillars of economic well-being have high potential to create meaningful change. While these are not the only issues that families deal with, we believe they are the most urgent in our community.

Within each of these levers, we organize our efforts around key focus areas that integrate the importance of opportunity in places, effective systems that work together and center community voice, and community conditions that enable better outcomes:

- **Educational Success:** Children, youth, and young adults achieve educational milestones on time.
 - Focus Areas: Kindergarten readiness, early learning enrollment, chronic absenteeism reduction, place-based educational improvement, career pathway development, effective cross-sector educational partnerships.
- **Financial Empowerment:** Individuals and families build financial stability, savings, assets, and pathways to economic mobility.
 - Focus Areas: Resource navigation, tax credits and public benefits access, financial capability services, workforce pathways, income supports, coordinated financial stability strategies and policies.
- **Housing Security:** Families live in stable housing that meets their financial means and supports long-term well-being.
 - Focus Areas: Eviction prevention, housing stability initiatives, homeownership pathways, coordinated housing response systems, housing advocacy, and neighborhood-level solutions.

These outcomes are supported through activities that strengthen individuals and families, improve community systems, and contribute to broader systems change.

FIVE COMPONENTS OF UNITED WAY'S WORK

To navigate this framework, it helps to understand the distinct concepts that shape how United Way organizes its strategy and measures its impact:

Geographic Footprint describes *where we work* — a nine-county region across Southwest Ohio, Northern Kentucky, and Southeast Indiana. While some initiatives operate regionwide, others are concentrated in specific geographies where need is greatest or where place-based strategies are most likely to produce lasting change.

Target Population describes *who we prioritize* — Individuals, families, and communities striving to achieve greater economic stability and mobility — particularly those facing barriers related to income, race, geography, or access to opportunity. Families with children under age six, female-headed households, young people with system involvement and communities of color are priority populations given the disproportionate impact of poverty and systemic barriers on long-term outcomes.

Impact Areas describe *what we work on* — Educational Success, Financial Empowerment, and Housing Security. These are the levers UWGC has identified as most critical for economic mobility in Greater Cincinnati.

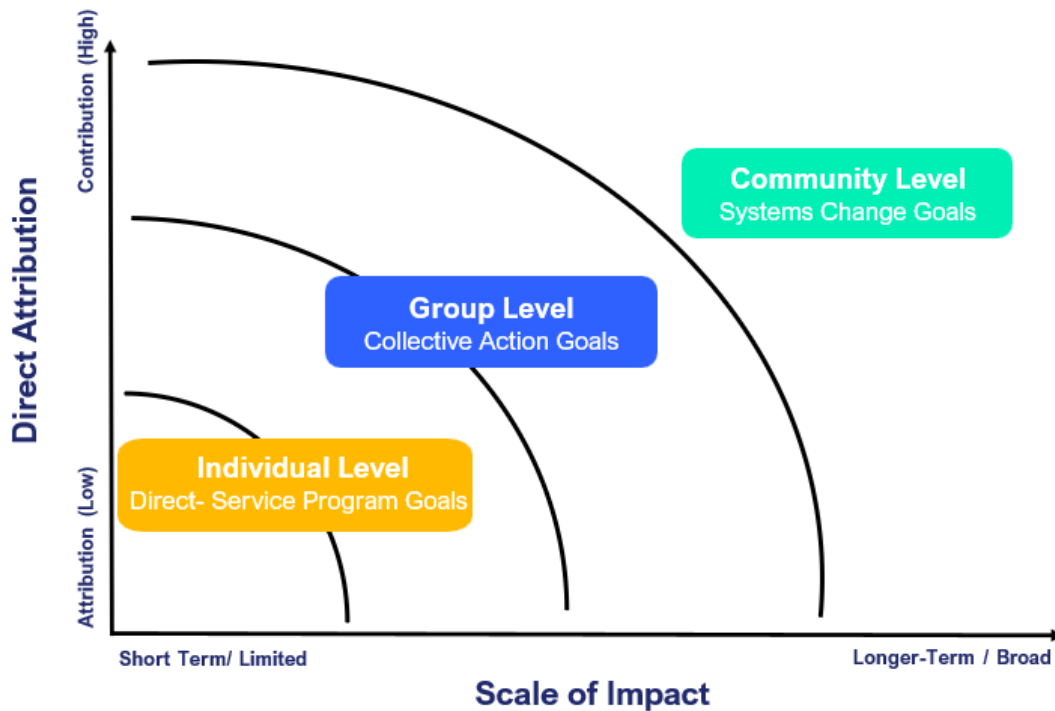
Impact Strategy Areas describe *how we work* — Stabilize, Connect, and Build. These reflect the nature and intended outcomes of the efforts. The same issue area can be addressed through any of the three strategy types.

Intervention Level describes *who* is being intentionally served — Individuals, Groups, or Communities. This shapes the specific interventions to activate, what questions to ask, what to measure, and what evidence of success looks like.

UNITED WAY'S ROLE IN COMMUNITY CHANGE

Additionally, research and evidence point to a consistent finding: meaningful community-level change requires multiple, interconnected types of work happening at the same time. No single intervention type is sufficient on its own. United Way of Greater Cincinnati often refers to our impact as a “portfolio” of strategies - intentionally works across multiple levels of change simultaneously, paying attention to strategies focused on immediate action to support individuals and families and long-term system improvement.

The graphic below illustrates why a portfolio of efforts is needed given the fundamental tension in community impact work: as the scale of change increases, the ability of any one organization to directly attribute outcomes decreases. Direct services reach individuals and families with measurable, near-term results. Coordinated network strategies reach broader populations but depend on many partners working in alignment to improve the outcomes of a specific group. Community and systems-level change affects the most people over time.



Given this structure, United Way’s measurement framework accounts for different types of measurement and learning based on the **intervention level** of the impact solution.

At the **individual level**, activities are typically direct services and programs and results are near-term and directly attributable to the provider or program. Success is measured by what changed for the people served.

At the **group level**, primary activities build upon direct services to include efforts focused on convening, coordinating, and building shared solutions to address the outcomes of a defined population. Results emerge through collective action and success is measured not just by the outcomes at the individual level but by whether organizations are working better together and whether a defined population, as a whole, is better served as a result.

At the **community level**, the focus of activities are to support sector and community-wide change. Activities include strategies related advocacy, building civic infrastructure, and supporting nonprofit sector practice or capacity change. Results are long-term and shaped by many actors. Success is measured by whether community conditions are improving – such as whether power, resources, and opportunity are more equitably distributed and if multiple indicators across a region are improving.

ALIGNING INTERVENTION-TYPE TO MEASUREMENT APPROACH

Because these intervention approaches operate differently and serve different units of change, they require different questions, different indicators, and different standards of evidence. What counts as success for a direct service program looks very different from what counts as success for a place-based ecosystem initiative — and holding them to the same measures misses what actually matters.

The table below outlines how UWGC approaches measurement at each level of intervention.

	Individuals	Groups	Communities
Who is being served	Specific individuals and families directly served by an intervention.	A defined population (ex. people in a specific place, with shared needs, or people served by a set of partners) and the organizations that serve them by the intervention or set of interventions.	A geographic community or bounded part of a system directly or indirectly impacted by the intervention or set of interventions.
Purpose	Help individuals and families achieve greater stability by meeting immediate and ongoing needs and improving outcomes.	Strengthen how organizations, services, and resources work together so a defined population has better access, experiences better coordination, and achieves better outcomes.	Improve the community conditions, systems, and opportunities that create lasting progress in Educational Success, Financial Empowerment, and Housing Security.
Key Learning Questions	Who was reached? What changed for individuals and families? What are participants telling us about their experiences and needs? How consistently does the intervention lead to the desired outcome?	Are partners working together more effectively? Are services easier to access and navigate? Are resources and efforts becoming more aligned for the people they serve?	Are things getting better for people in this community? What's changing about how decisions get made, where resources go, and who has a seat at the table? Are community conditions improving?
Common Measures	Individuals and families served, participant outcomes, demographics, service utilization, participant feedback	Partner participation, referrals, successful connections, collaborative initiatives, shared practices, network engagement	Policy changes, community-level indicators, resource alignment, practice adoption, community leadership, civic participation
Evidence of Success	Improved individual outcomes, increased stability, participant stories, family feedback	Stronger partnerships, increased referral success, adoption of shared approaches, collective action that improves outcomes for a specific population	Policy wins, shifts in institutional practice, stronger community voice, changes in narratives or resource allocation

UNITED WAY'S IMPACT STRATEGY AND THE ROLE OF COMMUNITY INVESTMENTS

Annually, United Way invests 85% of our revenue directly in community impact — the majority flowing to nonprofit partners and community organizations working toward these priorities. But investments in community partners and solutions are not siloed from our organizational impact strategy which involves a combination of community investments, strategic leadership, partnerships, advocacy, data and evaluation, volunteer engagement, and direct initiative management. Funding is an important tool, but it is one of many — and it flows into and supports the strategy rather than defining it.

To simply how we manage our resources, United Way is now focusing on categorizing our impact strategies, based on the intended outcomes of the work or investment, into the following three impact strategy areas:

- **Stabilize:** Community investments and solutions that help individuals and families meet urgent needs and build toward greater economic security. This includes community investments in nonprofit partners' direct services and regional solutions UWGC operates directly, including Free Tax Prep and 211.
- **Connect:** Community investments and solutions aimed at improving how services connect across a continuum, sector or within specific neighborhoods to advance a shared goal or improve outcomes at a group or community-level. This includes network-focused pilots projects, place-based initiatives, and collaborative learning efforts focused on specific populations and geographies.
- **Build:** Community investments and solutions that shift the conditions shaping economic mobility across the region through establishing new civic infrastructure and partnerships, connecting data systems, advancing policy change, and building community-led capacity for sustainability. This is long-horizon work, and includes multi-year partnerships with partners, shared data infrastructure, and coordinated investments in local collective impact efforts, civic leadership and backbone leadership.

The following table summarizes United Way's impact priorities and intended contributions for FY27–FY29 and alignment to annual community investments.

IMPACT STRATEGY OVERVIEW

	 STABILIZE	 CONNECT	 BUILD
MEASURES OF SUCCESS BY INTERVENTION LEVEL	Individuals: Individuals and families served; Number of services provided; Participant outcomes; Organizational learning and community insights		
	Groups: Partner participation; Resource alignment; Implementation outcomes of collaborative solutions; Improved coordination and efficiency; Lessons learned and opportunities for scale		Communities: Progress towards shared community outcomes; Sector or policy improvements; Adoption of sustainable solutions; Improvements in community-level indicators or trends
UNITED WAY PRIORITY (FY27-FY-29)	Funding to community organizations delivering direct services and investments regional solutions managed by United Way, including Free Tax Prep, and 211	Resources and investments to convene partners, strengthen referral pathways and support place-based initiatives to advance shared outcomes.	Investments in and staff capacity to support multi-year civic partnerships, shared data infrastructure, coordinated advocacy and narrative strategies, and community-led systems change.
UNITED WAY PRIMARY ROLES	Funder, learning partner, and capacity builder.	Convener, coordinator, and funder.	Strategic leader, backbone organization, advocate and funder.

These three strategy areas are not separate categories of work — they build on one another. **Stabilize** is the foundation: direct services that meet people's immediate needs. **Connect** builds on that foundation by improving how the organizations delivering those services work together, so a defined population is better served as a whole. **Build** extends both — it addresses the policies, resources, and systems conditions that shape whether Stabilize and Connect efforts can succeed and scale across the community.

In practice, this means Build-level work doesn't replace direct services or coordination — it depends on them. A civic infrastructure investment or policy advocacy effort is only as strong as the direct-service and coordination work happening underneath it. This is why, as shown in the table above, Stabilize-level outcomes are tracked across all three strategy areas, Connect-level outcomes span Connect and Build, and Community-level outcomes are the distinct focus of Build.

PARTNERSHIP AND SHARED MEASUREMENT

All partners and United Way initiatives contribute to a shared learning agenda. Reporting is intended to support continuous improvement, not simply accountability. United Way shares what we learn — across partners, across issue areas, and back to the community.

Reporting expectations vary depending on the strategy type a partner is engaged in. Reporting requirements and specific questions are reflective of the different kinds of evidence each strategy generates — and ensures that partners are asked to report on what they are actually positioned to know.

People Reached: Who is being served, and are we reaching the right people?

- Stabilize: individuals and families served, demographics, service utilization
- Connect: populations and geographies reached through coordinated services
- Build: people benefiting from or engaged in civic processes and systems change
- Required Measures – Demographics (see appendix)

Direct Results: What changed as a result of this work?

- Stabilize: changes in stability and outcomes achieved for individuals and families
- Connect: improvements in access, navigation, and service continuity for a defined population
- Build: evidence of the impact of activities focused on shifts in policies, practices, or resource flows, understanding that attribution at this level is often shared across multiple actors and contributors.
- **Required Measure(s)** – at least one early indicator from your primary impact area (see appendix)

Partner & Network Effectiveness: How well are organizations and resources working together?

- Stabilize: referrals made and connections to other services
- Connect: coordination quality (i.e. referral completion rates, participant experience feedback score), shared practices adopted, and partner alignment across a continuum
- Build: civic partnerships sustained, cross-sector collaboration, and shared infrastructure built or strengthened
- **Required Measure(s)** – At least one community outcome aligned to your intervention level for your primary impact area (see appendix)

Community Conditions: What is changing in the broader environment?

- Stabilize: insights into community need based on who is coming through the door and what they are experiencing
- Connect: changes in trends of need, gaps in the service continuum, and emerging patterns across a population or geography
- Build: systems-level shifts — narrative change, power distribution, policy environment, and movement in community-level indicators
- Required Narrative

Learning & Adaptation: What should we do differently — and what should United Way know?

- Stabilize: what is working in service delivery, barriers participants face, and innovations in practice worth sharing
- Connect: what coordination approaches are most effective and where alignment is breaking down
- Build: what the data cannot tell us, emerging opportunities for systems change, and recommendations for future investment
- Required Narrative

APPLYING THIS FRAMEWORK

This framework is a living tool — intended to guide decisions at every stage of United Way's work with partners and initiatives, not just at the point of reporting.

At the start of a partnership or initiative United Way and partners use this framework to align strategy type, intended outcomes, and measurement approach before work begins. Key questions: Who are we trying to serve? What level of change are we working toward? What does success look like — and how will we know?

During implementation Partners and United Way staff use the framework to monitor progress, identify what's working, and surface early signals of impact or challenge. Reporting at this stage focuses on understanding what efforts are underway and how aligned they are to the original plan and intended outcomes — surfacing lessons and adjusting what isn't working before it becomes a problem.

At the end of a grant or initiative cycle Partners report on outcomes achieved, lessons learned, and recommendations for future investment. United Way synthesizes findings across partners and issue areas to identify patterns, gaps, and opportunities — and shares those findings back with partners and the broader community.

When adapting strategy United Way reviews the shared learning agenda annually to assess whether the framework is capturing what matters, whether the right questions are being asked, and whether the portfolio mix across Stabilize, Connect, and Build is producing the change we're working toward. Partners contribute to this process through their reporting and through direct engagement with United Way staff.

By using a shared framework across all stages — from investment decisions through final reporting — United Way and its partners can better understand not only whether change is happening, but how it happens, and what it takes to sustain it.

RESEARCH FOUNDATIONS

This framework draws upon research and practice in economic mobility, performance measurement, collective impact, and systems change.

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APPENDIX A: UWGC OUTCOME PATHWAYS

INTRODUCTION

Improving educational success, financial empowerment, and housing security requires action at multiple levels. Direct services help individuals and families make progress toward greater stability. Coordinated efforts improve how organizations and resources work together to serve a defined population. Community and systems-level strategies strengthen the conditions that shape outcomes for everyone.

The following tables demonstrate how these different intervention levels contribute to shared community outcomes. By linking intervention-level measures to broader community outcomes, the framework provides a common language for understanding contribution, measuring progress, and learning what it takes to create lasting change.



EDUCATIONAL SUCCESS



	INDIVIDUALS & FAMILIES	GROUPS & NETWORKS	COMMUNITIES & SYSTEMS
PURPOSE	Helping children and youth build the skills, experiences, and supports needed to succeed.	Improve coordination across organizations serving children, youth, and families.	Strengthen the conditions that support educational success across a community.
EXAMPLE ACTIVITIES	■ Tutoring, mentoring, after-school programs ■ Attendance supports ■ Family engagement	■ Shared referral systems ■ School-community partnerships ■ Collaborative initiatives	■ Policy advocacy ■ Shared data systems ■ Placed-based strategies ■ Resource alignment
EARLY INDICATORS	■ Children enrolled or served by programming ■ Chronic absenteeism ■ Academic growth or improvement ■ Social-emotional development	■ Percentage of children or youth served ■ Referral completion ■ Partner participation ■ Shared practices adopted	■ Access to early learning Preschool and Early Childhood Enrollment ■ Policy changes ■ Resource alignment
EVIDENCE OF PROGRESS	Students demonstrate improved educational engagement and achievement.	Children and families experience more coordinated support and fewer service gaps.	Community systems become more responsive and supportive of educational success.
COMMUNITY OUTCOMES	 Kindergarten Readiness  3rd Grade Reading  8th Grade Math  College, Career & Service Readiness  Post-Secondary Attainment		



FINANCIAL EMPOWERMENT



	INDIVIDUALS & FAMILIES	GROUPS & NETWORKS	COMMUNITIES & SYSTEMS
PURPOSE	Help individuals and families improve financial stability and resilience.	Improve how financial supports and opportunities are coordinated.	Strengthen conditions that support economic mobility and financial well-being.
EXAMPLE ACTIVITIES	■ Tax preparation ■ Financial coaching ■ Benefits enrollment ■ Workforce services	■ Coordinated service delivery ■ Referral partnerships ■ Employer engagement	■ Public benefits advocacy ■ Financial inclusion efforts ■ Employer practice changes
EARLY INDICATORS	■ Benefits accessed ■ Savings accumulated <i>Households with at least \$2,000 in emergency savings</i> ■ Employment obtained <i>Share of adults ages 25 to 54 who are employed</i>	■ Referral completion ■ Coordinated service delivery ■ Employer participation	■ Employer policy changes ■ Resource alignment <i>Food Insecurity Rate</i> ■ Digital Access <i>Share of households with a computer and broadband internet subscription in the home</i> ■ Jobs paying living wages <i>Pay on an average job compared with the cost of living</i> ■ Debt Reduction <i>Share of adults with debt in collections</i>
EVIDENCE OF PROGRESS	Families increase financial stability and access to economic opportunity.	Families experience more seamless access to services and supports.	Systems become more responsive and supportive of economic mobility.
COMMUNITY OUTCOMES	 Household Income Growth  Reduced Poverty  Economic Mobility		



HOUSING SECURITY



	INDIVIDUALS & FAMILIES	GROUPS & NETWORKS	COMMUNITIES & SYSTEMS
PURPOSE	Help households obtain and maintain stable housing.	Improve coordination across housing supports and services.	Strengthen housing conditions and systems across communities.
EXAMPLE ACTIVITIES	■ Eviction prevention ■ Housing navigation ■ Home repairs ■ Stabilization services	■ Coordinated housing response ■ Referral partnerships ■ Shared housing practices	■ Housing advocacy ■ Resource alignment ■ Neighborhood investment.
EARLY INDICATORS	■ Housing retention ■ Reduced disruptive moves	■ Referral success ■ Coordinated navigation ■ Shared practices	■ Housing policy changes ■ Housing supply improvements <i>Number of affordable and available housing units</i> ■ Resource alignment
EVIDENCE OF PROGRESS	Families maintain stable housing and reduction in housing crises.	Residents experience more effective and coordinated housing support.	Communities improve access to safe, stable, and affordable housing.
COMMUNITY OUTCOMES	 Housing Stability  Reduced Housing Cost Burden  Reduced Evictions  Increased Homeownership		

APPENDIX B: REQUIRED DEMOGRAPHIC AND DEFINITIONS

REQUIRED DEMOGRAPHICS

- Individuals served: Number of or percentage of total people served by the organization that benefited from United Way funding. (This can be an estimated figure. For example, if United Way funding was applied to the general organizational budget, share the percentage it represents.)
- Individuals served by the following categories:
 - Age Groups:
 - 0-5
 - 6-13
 - 14-18
 - 19-25
 - 26-39
 - 40-59
 - 60-79
 - 80-100+
 - Unknown
 - Race and ethnicity:
 - White/Caucasian
 - Black/African American
 - Asian
 - Native Hawaiian or Pacific Islander
 - American Indian or Alaska Native
 - Multi-Racial
 - Other
 - Race Unknown
 - Gender (where appropriate): Female, Male, Transgender, Gender Non-Conforming, Gender Unknown
 - ZIP code or place of residence:
 - Zip code (typically top 10 zip codes served)
 - Place of residence:
 - Northern Kentucky places of residence: Boone, Campbell, Grant, Kenton counties
 - Southwest Ohio: Adams, Brown, Clermont, and Hamilton counties
 - Southeast Indiana: Dearborn and Ohio counties
 - Other: counties not represented in the previous categories
 - Unknown

- Income Level: At or below 100%, Between 101 – 200%, At 201%+
- If available: Unduplicated households served and priority household populations (where appropriate)
 - Households with children under the age of 5
 - Households with school aged children 6-18

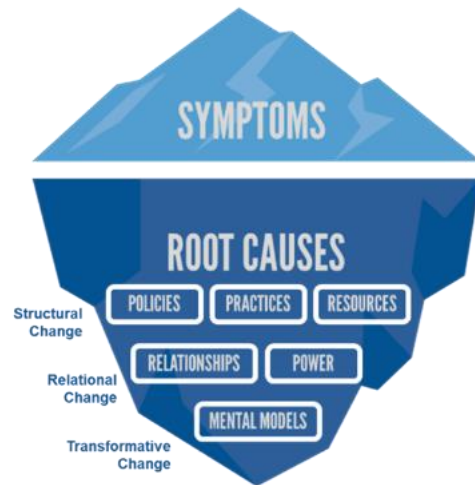
Family & Demographic Definitions

- **Family Definitions:**
 - A family is a group of two or more persons related by birth, marriage, or adoption who live together; all such related persons are considered as members of one family. (Source: U.S. Census)
 - Family includes, but is not limited to, regardless of marital status, actual or perceived sexual orientation, or gender identity, any group of persons presenting for assistance together with or without children and irrespective of age, relationship, or whether or not a member of the household has a disability. A child who is temporarily away from the home because of placement in foster care is considered a member of the family. (Source: U.S. Department of Housing and Urban Development – McKinney- Vento Act, as amended by the HEARTH Act)
 - Family means any person(s) who plays a significant role in an individual's life. This may include a person(s) not legally related to the individual. Members of "family" include spouses, domestic partners, and both different-sex and same-sex significant others. "Family" includes a minor's parents, regardless of the gender of either parent... The concept of parenthood is to be liberally construed without limitation as encompassing legal parents, foster parents, same-sex parent, stepparents, those serving in loco parentis, and other persons operating in caretaker roles. (Source: HRC.org)
- **Household:** All the people who occupy a housing unit (such as a house or apartment) as their usual place of residence
- **Income:** Income received on a regular basis (exclusive of certain money receipts such as capital gains and lump-sum payments) before payments for personal income taxes, social security, union dues, Medicare deductions, etc. This definition includes income received from wages, salary, commissions, bonuses, and tips; self-employment income; interest, dividends, net rental income, royalty income, or income from estates and trusts; Social Security or Railroad Retirement income; Supplemental Security Income (SSI); any cash public assistance or welfare payments from the state or local welfare office; retirement, survivor, or disability benefits; and any other sources of income received regularly such as Veterans' (VA) payments, unemployment and/or worker's compensation, child support, and alimony. (Source: U.S. Census)
- **% FPL:** Most recently available Federal Poverty Guidelines (Source U.S. Department of Health and Human Services)

- **Race/Ethnicity.** The identity of the individual served, or household based on the identify of the primary person served. Knowing that many families have members of multiple racial or ethnic identities, we recognize that the count of reported identities may exceed the total number of people served.
- **Zip Code for primary family residence .** We would like to know where within our 9-county region individuals and families are served and to identify opportunities for supporting services that are accessible to them.

APPENDIX C: SYSTEMS CHANGE EVIDENCE FRAMEWORK

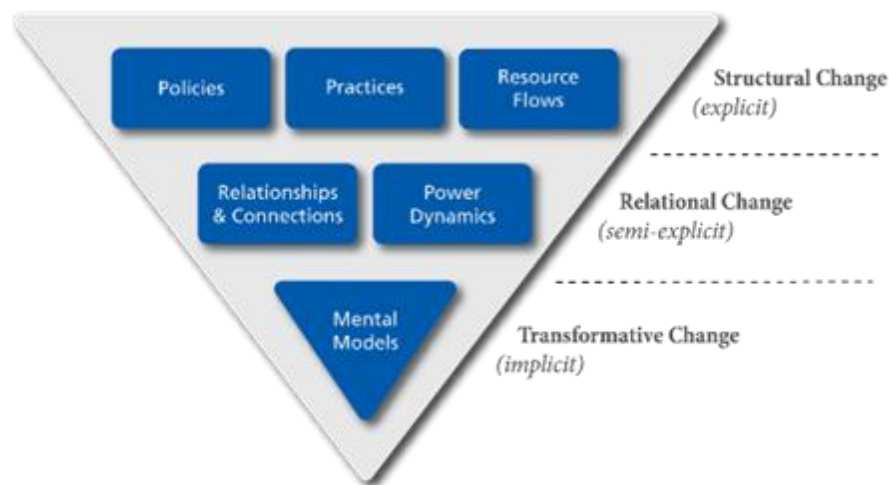
Throughout this document, we use the term “change conditions.” This term is used in reference to “systems change” or the notion of changing conditions that either impede or enable social change. As described by Social Innovation Generation (SIG) in Canada system change work shift “the conditions that are holding the problem in place”. Specifically, in the human services sector, we use the following definition: A system composed of “multiple programs, policies, agencies, or institutions at the national, state, and local level with the common goal of achieving better outcomes for [clients]” (Coffman 2007)



In the context of United Way’s work, it includes any effort that intentionally seeks to address root causes that limit economic mobility and get in the way of all families achieving economic well-being.

In “The Water of Systems Change” by John Kania, Mark Kramer, and Peter Senge, they describe six conditions to systems change visually depicted in the following graphic.

SYSTEMS CHANGE CONDITIONS - DEFINITIONS



Policies: Changes to laws, regulations, organizational policies, or formal decision-making processes.

Practices: Adoption of new approaches, standards, procedures, or evidence-based models.

Resource Flows: Changes in how funding, staffing, information, or services are allocated.

Relationships & Connections: Improved collaboration, trust, and coordination among organizations and sectors.

Power Dynamics: Greater participation and influence by community members and those most affected by issues.

Mental Models: Changes in beliefs, assumptions, narratives, and ways of understanding community challenges.

What are the elements of a system?

- **Pathways:** Comprised of a set of programs and services, often organized by a domain or towards a specific outcome, designed to move clients through a progression of steps, supporting them to achieve positive outcomes.
- **Institutional structures:** Policies, laws, and regulations; funding flows and resource allocations; culture, norms, and standard operating procedures; and knowledge bases – included shared vision or outcomes. All of these structures form the institutional context in which pathways function. They are the factors typically outside the control of actors/ stakeholders that incentivize, constrain, and enable the approaches that actors use to build and maintain pathways.
- **Stakeholders:** While often part of the structures of the system, its typically helpful to consider stakeholders – individuals, groups and organizational actors – that are part of the system and relationships between and among stakeholders.

What are the ways to improve the system?

Systems change can focus on improving the pathway within the system or address the institutional structures of the system. We've categorized system change into five different buckets:

- **Scale:** The ability of the pathway (and embedded programs / services) to regularly meet the demand for services. Change efforts work to add additional program slots, expand availability or improve accessibility so that the supply of program is able to meet the needs of the target population.
- **Quality:** The ability of programs and services in the system to adhere to shared quality standards, best-practices or implement fidelity to evidence-based practices / models. Change efforts work to improve the ability of programs and services in the system to meet quality standards, support professional development, or provide capacity building for programs to be better able to customize services to best meet different needs of target populations.
- **Comprehensiveness:** The extent to which the pathway regularly meet all aspects of target populations' need through comprehensive offerings with little to no gaps in services. Change efforts promote diversification & expansion of services/ partners to create the right mix of services & programs within the system to meet the diverse needs of target populations and/or ensure there are enough of these different types of programs so that the pathway has few or no service gaps.
- **Connections:** The extent to which the programs/ services are strongly connected through formal alignment and linkages in the pathway. Change ideas work to:
 - Create or improve links between steps so that people can successfully move from one step to another
 - Align goals across pathway program / services so all steps lead to a shared outcome and steps build upon on one another with little duplication
 - Support cross-system coordination & alignment with complementary systems or pathways
- **Conductive Structures:** The extent to which the system's incentives, constraints and opportunities allow & encourage stakeholders to build more effective pathways. Structural change efforts work across system components like policy/ rules, cultural/ norms and financial/resource flows to:
 - Reduce barriers that get in the way of effective pathways of all populations
 - Create new or enhance enablers / incentives that increase access, get better outcomes, or allow for greater scale

APPENDIX D: USING A LOGIC MODEL

A logic model translates the measurement framework into a practical plan for a specific initiative, investment, or partnership. It shows the connection between the resources invested, the work carried out, the results expected at different stages, and the broader community outcomes the work is intended to advance.

Logic models help United Way and its partners:

- Develop a shared understanding of how an initiative is expected to create change.
- Connect activities and near-term results to the framework's Stabilize, Connect, and Build strategies.
- Identify realistic outcomes based on the initiative's role and level of intervention.
- Select measures that show both progress and results.
- Make assumptions explicit and identify external factors that may affect success.
- Clarify the initiative's distinct contribution to outcomes that may depend on many organizations and conditions.

Complete the logic model during the planning or early implementation stage and revisit it as the work evolves. Begin with the intended outcomes and work backward to identify what must happen to achieve them. Then review the completed model from left to right to confirm that the resources and activities logically support the expected results.

INSTRUCTIONS FOR USING THE LOGIC MODEL TEMPLATE

A suggested template is provided to help you apply the measurement framework to your work. A strong logic model will include the elements shared in detail below, and tell a clear and credible story: Given these resources, we will implement key activities that produce immediate results and contribute to longer-term outcomes.

1. **Logic Model For.** Enter the name of the initiative, investment, program, or partnership.
2. **Inputs/Resources.** Identify the resources needed to carry out the work. Inputs may include funding, staff time, partner expertise, volunteers, facilities, technology, data, community relationships, or other assets.
3. **Activities.** Describe the primary actions the initiative will undertake. Not every initiative will include activities in all three areas. Complete only the rows relevant to the work. Organize activities by the type of strategy they support:
 - **Stabilize:** Direct services or supports that help individuals and families address immediate needs and improve stability.
 - **Connect:** Coordination, partnership, or shared approaches intended to improve how organizations and services work together for a defined population.
 - **Build:** Efforts to strengthen community conditions or change policies, practices, resource flows, relationships, power dynamics, or shared ways of understanding an issue.

4. **Outputs.** Identify the direct, countable products of the activities. Outputs show what was delivered or completed—not whether people’s circumstances changed. Examples include individuals served, services provided, referrals completed, partners engaged, trainings conducted, shared tools developed, or policy recommendations advanced.
5. **Short-Term Outcomes.** Describe the changes expected first, typically during the initiative or shortly after activities occur. These may include changes in knowledge, skills, access, engagement, organizational practice, coordination, or individual stability. Short-term outcomes should be closely connected to the activities and reasonably influenced by the initiative.
6. **Mid-Term Outcomes.** Describe the changes expected as early progress is sustained or expanded. These may include improved participant outcomes, more effective service pathways, stronger partner alignment, adoption of shared practices, or changes in organizational and system performance.
7. **Long-Term Outcomes.** Identify the broader result the initiative is intended to advance over time. Select one or more relevant community outcomes from the outcome pathways in Appendix A. Long-term outcomes are often influenced by multiple organizations, strategies, and external conditions; the initiative should demonstrate a credible contribution rather than claim sole responsibility.
8. **External Factors.** Identify conditions outside the initiative’s direct control that may affect implementation or results. Examples include economic conditions, policy changes, workforce availability, funding shifts, housing supply, community trust, or changes in participant needs.
9. **Assumptions.** Document the beliefs that must hold true for the proposed activities to lead to the expected outcomes. For example: participants can access the services offered; partners will adopt a shared practice; or improved coordination will reduce gaps in service.
10. **Evidence of Contribution.** Identify the information that will help determine whether the initiative played a meaningful and distinct role in achieving the outcomes. Evidence may include outcome data, participant feedback, referral or service-navigation data, partner observations, implementation findings, policy or practice changes, community-level trends, and examples showing how the initiative influenced decisions or results.

LOGIC MODEL TEMPLATE

LOGIC MODEL FOR: _____

Inputs/RESOURCES	ACTIVITIES	OUTPUTS	SHORT TERM OUTCOMES	MID TERM OUTCOMES	LONG TERM OUTCOMES
	STABILIZE	<i>Select one or more community outcomes from the outcome tables and put them here.</i>			
	CONNECT				
	BUILD				
External Factors		Assumptions			
What types of evidence helps us validate that the distinct and unique role you have in contributing to these outcomes:					