FFT Performance Report Guide: Line Definitions

NOTE: This is a draft version of this guide, which will be continually updated as the performance report is updated. Lines that are in italics in this guide are lines that are still under construction on the performance report itself. If you find an error in the performance report or this guide, please notify the FOC support desk (fftfocsupport@lisc.org) and give enough detail to be able to diagnose the problem (i.e. the dates of the report you ran, the names of the participants who are not being reported correctly, etc.). With your help, we will continue to improve the report and this guide. Thank you!

Filters

Optional: Select a group name to limit the population.

- **No Filters (all clients):** This option includes all participants enrolled in Salesforce (default value).

- *Group(s) for Reporting* **values (Table 1, pg 32):** Selecting any of these options will limit the population to the group name selected per the clients' Case Records.

General

- **For the last month:** This column reports data only for the last (partial) month of the report period. For example, for a report covering 1/15/23-2/15/23, this column would show data for 2/1/23-2/15/23.
- **For the report period:** This column reports data from the entire report period you choose.

Employment Counseling (EC)

(E1) People who got service for the first time: The unduplicated[1] count of participants who have not received any of the following services before the report period:
- A TABE Test, WorkKeys Test, GAIN Test, CASAS Test, Accuplacer Test, or Other Test assessments.
- An Employment Counseling Service Entry.
- An Education/Training Program record with any of the following during the report period: "Start date" or "End date".
- An Education/Training Program record Education Progress.
- An Employment record with any of the following during the report period: "Job Start Date" or "Job End Date".
- An Employment Advancement record.
- A Degree/Certificate/License record.
- An Outbound Referral with any of the following selected in the "Referral Reason(s)" field: "Education/training", "Employment services", "Job interview", "License/certification".
- A Work/Education Supports service.

[†] "Unduplicated" means that each participant is counted only once. For example, if 100 participants got service and 500 records were entered for these 100 participants, then the unduplicated count of participants who got service is 100 (not 500).

(E2) People who got at least one service: The unduplicated count of participants who have at least one of the following services recorded during the report period:

- A TABE Test, WorkKeys Test, GAIN Test, CASAS Test, Accuplacer Test, or Other Test assessments.
- An Employment Counseling Service Entry.
- An Education/Training Program record with any of the following during the report period: "Start date" or "End date".
- An Education/Training Program record Education Progress.
- An Employment record with any of the following during the report period: "Job Start Date" or "Job End Date".
- An Employment Advancement record.
- A Degree/Certificate/License record.
- An Outbound Referral with any of the following selected in the "Referral Reason(s)" field: "Education/training", "Employment services", "Job interview", "License/certification".
- A Work/Education Supports service.

(E3) People working on Employment Search Story: The unduplicated count of participants who have at least one Employment Search Counseling Service Entry with a "Date" during the report period and with any value recorded under "employment search".

(E4) People who had at least one direct counseling contact: The unduplicated count of participants who have at least one Employment Counseling Service Entry with a "Date" during the report period, "Yes" in the "Reach person you attempted to contact?" field, and "Client" in the "Contact with" field.

(E5-E7) Frequency of Counseling Contact (since enrollment, among people with at least one direct counseling contact during the report period):

- **1 time only:** The count of participants with exactly one Employment Counseling Service Entry with "Yes" in the "Reach person you attempted to contact?" field, "Client" in the "Contact with" field, and a "Date" that is on or after the "Enrolled Date" on the participant's Case Record and on or before the end date of the report period.
- **2-4 times exactly:** The count of participants with exactly two, three, or four Employment Counseling Service Entries with "Yes" in the "Reach person you attempted to contact?" field, "Client" in the "Contact with" field, and a "Date" that is on or after the "Enrolled Date" on the participant's Case Record and on or before the end date of the report period.
- **5 or more times:** The count of participants with five or more Employment Counseling Service Entries with "Yes" in the "Reach person you attempted to contact?" field, "Client" in the "Contact with" field, and a "Date" that is on or after the "Enrolled Date" on the participant's Case Record and on or before the end date of the report period.

(E8) People with an increase in earnings: The unduplicated count of participants with increases in wages, increases in hours, and/or placed in jobs.

(E9) People with an increase in wages (in same job OR from one job to another): The unduplicated count of participants who have at least one Employment Record with a Start Date during the report period with a value in the Hourly Wage field that is greater

than the value in the Hourly Wage field on the participant's last active Employment Record OR who have an Employment Advancement dated during the report period that shows an increased Hourly Wage on an existing Employment Record (regardless of whether the previous Employment Record or previous wage was entered before or during the report period and regardless of whether the previous or current Employment Record is marked as "Client had this job before enrollment"). Does not include any Employment Records with "Unpaid/Volunteer" in the Wage Type field.

(E10) People with an increase in hours (in same job OR from one job to another): The unduplicated count of participants who (1) have an Employment Record with a "Job Start Date" during the report period with a value in "Hours per Week" that is greater than the value in "Hours per Week" on the participant's most recently terminated Employment Record, OR (2) have an Employment Advancement with a "Date of change in employment" during the report period that shows an increase in the "Current Hours per Week" (regardless of whether the previous Employment Record or previous Hours per Week was entered before or during the report period and regardless of whether the previous or current Employment Record is marked as "Client had this job before enrollment"), OR (3) have a new Employment Record with a "Job Start Date" during the report period with "Hours per Week" greater than 0 and still have another unterminated Employment Record with "Hours per Week" greater than 0 (i.e. concurrent jobs). Does not include any Employment Records with "Unpaid/Volunteer" in the Wage Type field.

(E11) People placed in jobs (subsidized or unsubsidized): The unduplicated count of participants who have at least one Employment Record that has a "Job Start Date" during the report period, does not have the "Client had this job before enrollment" box checked, and have either "Subsidized/Stipend Job" or "Unsubsidized Job" selected in the Wage Type field.

(E12) People with subsequent BUDGETs completed for last increase in earnings during report period: The unduplicated count of participants who have a subsequent budget assessment with an "Assessment Date" ON or AFTER the date of the most recent increase in earnings during the report period.

(E13) People with Net Income going up: The unduplicated count of participants with a value in the "Total Monthly Net Income" field on the participant's most recent Budget assessment during the report period that is greater than the value in this field on said participant's first Budget assessment ever.

(E14) People placed in jobs (all types): The unduplicated count of participants who have at least one Employment Record that has a "Job Start Date" during the report period and does NOT have the "Client had this job before enrollment" box checked.

(E15) People placed in unsubsidized jobs: The unduplicated count of participants who have at least one Employment Record that has a "Job Start Date" during the report period, does NOT have the "Client had this job before enrollment" box check, AND has "Unsubsidized Job" selected in the Wage Type field.

(E16) Median hourly wage for last placement: The median of the following for each participant: the value in the "Hourly Wage" field on the most recently started Employment Record marked as "Unsubsidized Job" in the Wage Type field with a "Job Start Date" during the report period. If the most recently started unsubsidized job with a "Job Start Date" during the report period has any Advancement(s), use instead the value in "Current Hourly Wage" on the Advancement with the most recent date in "Date of change in employment" that is during the report period.

(E17) Average hourly wage for last placement: The average of the following for each participant: the value in the "Hourly Wage" field on the most recently started Employment Record marked as "Unsubsidized Job" in the Wage Type field with a "Job Start Date" during the report period. If the most recently started unsubsidized job with a "Job Start Date" during the report period has any Advancement(s), use instead the value in "Current Hourly Wage" on the Advancement with the most recent date in "Date of change in employment" that is during the report period.

(E18) Placements during the report period due for any retention verification: The count of Employment Records with "Unsubsidized Job" selected in the "Wage Type" field, a "Job Start Date" during the report period, and a number in the "Days since job start date" roll-up on said Employment Record that is greater than the number of days in the next unachieved "Milestone Achieved" on the Advancement on said Employment Record with the most recent "Date". If the most recent Advancement does not have a value in the "Milestone Achieved" field, look for the most recent Advancement with a value in the "Milestone Achieved" field, and use that value for comparison. For example, if a participant has an unsubsidized Employment Record with a "Job Start Date" during the report period and a most recent Advancement with a "Date" during or after the report period with "90 days" in the "Milestone Achieved" field, then the participant should be included in this line if the value in the "Days since job start date" roll-up on said Employment Record is greater than 180. Only count the milestones up to 365 days. If the Employment Record in question has a date in the "Job End Date" field, then do not include that Employment Record in this line. If a participant's FOC Case Record has a "Status" of "Closed", do not include any of that participant's Employment Records in this line.

Retention: steady employment across placements (excluding previous employment):

(E19) Worked at an unsubsidized job during report period (excludes previous employment): The unduplicated count of participants who have an Employment Record with "Unsubsidized Job" selected in the "Wage Type" field, NOT a "Job End Date" before the report period, and NOT a check in the "Client had this job before enrollment" field.

- **(E20) Achieved 30-day steady employment during the report period:** Eligible (Denominator) column: The unduplicated count of participants who have an Employment record that has "Unsubsidized Job" selected in "Wage Type", the "Client had this job before enrollment" box is NOT checked, and the "Job End Date" is blank or there is at least one day during the report period that falls before the date in the "Job End Date" AND the "Job Start Date" + 30 days falls during the report period, EXCEPT: if a participant has a prior Employment Record with "Unsubsidized Job" selected for

"Wage Type", the "Client had this job before enrollment" box is not checked, and the "Job End Date" is 30 days or less before the "Job Start Date" of this Employment Record, then find the participant's last unsubsidized placement with a "Job Start Date" at least 31 days after the "Job End Date" of the preceding unsubsidized placement, and that "Job Start Date" + 30 days must fall in the report period to be included here. "Achieved (Numerator)" column: The unduplicated count of participants in the "Eligible (Denominator)" column in this row with an Advancement, on at least one of the Employment Record(s) with "Unsubsidized Job" selected in "Wage Type" and no check in the "Client had this job before enrollment" box that make up any part of the chain of such Employment Record(s) with gaps of no more than 30 days between them, with a "Status" of "Verified retention" and a "Date" that is on or after the "Job Start Date" of the participant's first unsubsidized placement in the chain of unsubsidized placements with no more than 30 days between them + 30 days. (The Advancement Date may be after the report period).

- **(E21) Achieved 90-day steady employment during the report period:** Eligible (Denominator) column: The unduplicated count of participants who have an Employment record that has "Unsubsidized Job" selected in "Wage Type", the "Client had this job before enrollment" box is NOT checked, and the "Job End Date" is blank or there is at least one day during the report period that falls before the date in the "Job End Date" AND the "Job Start Date" + 90 days falls during the report period, EXCEPT: if a participant has a prior Employment Record with "Unsubsidized Job" selected for "Wage Type", the "Client had this job before enrollment" box is not checked, and the "Job End Date" is 30 days or less before the "Job Start Date" of this Employment Record, then find the participant's last unsubsidized placement with a "Job Start Date" at least 31 days after the "Job End Date" of the preceding unsubsidized placement, and that "Job Start Date" + 90 days must fall in the report period to be included here. "Achieved (Numerator)" column: The unduplicated count of participants in the "Eligible (Denominator)" column in this row with an Advancement, on at least one of the Employment Record(s) with "Unsubsidized Job" selected in "Wage Type" and no check in the "Client had this job before enrollment" box that make up any part of the chain of such Employment Record(s) with gaps of no more than 30 days between them, with a "Status" of "Verified retention" and a "Date" that is on or after the "Job Start Date" of the participant's first unsubsidized placement in the chain of unsubsidized placements with no more than 30 days between them + 90 days. (The Advancement Date may be after the report period).

- **(E22) Achieved 180-day steady employment during the report period:** Eligible (Denominator) column: The unduplicated count of participants who have an Employment record that has "Unsubsidized Job" selected in "Wage Type", the "Client had this job before enrollment" box is NOT checked, and the "Job End Date" is blank or there is at least one day during the report period that falls before the date in the "Job End Date" AND the "Job Start Date" + 180 days falls during the report period, EXCEPT: if a participant has a prior Employment Record with "Unsubsidized Job" selected for "Wage Type", the "Client had this job before enrollment" box is not checked, and the "Job End Date" is 30 days or less before the "Job Start Date" of this Employment Record, then find the participant's last unsubsidized placement with a "Job Start Date" at least 31 days after the "Job End Date" of the preceding unsubsidized placement, and that "Job Start Date" + 180 days must fall in the report period to be included here. "Achieved (Numerator)" column: The unduplicated count of participants

in the "Eligible (Denominator)" column in this row with an Advancement, on at least one of the Employment Record(s) with "Unsubsidized Job" selected in "Wage Type" and no check in the "Client had this job before enrollment" box that make up any part of the chain of such Employment Record(s) with gaps of no more than 30 days between them, with a "Status" of "Verified retention" and a "Date" that is on or after the "Job Start Date" of the participant's first unsubsidized placement in the chain of unsubsidized placements with no more than 30 days between them + 180 days. (The Advancement Date may be after the report period).

- **(E23) Achieved 270-day steady employment during the report period:** Eligible (Denominator) column: The unduplicated count of participants who have an Employment record that has "Unsubsidized Job" selected in "Wage Type", the "Client had this job before enrollment" box is NOT checked, and the "Job End Date" is blank or there is at least one day during the report period that falls before the date in the "Job End Date" AND the "Job Start Date" + 270 days falls during the report period, EXCEPT: if a participant has a prior Employment Record with "Unsubsidized Job" selected for "Wage Type", the "Client had this job before enrollment" box is not checked, and the "Job End Date" is 30 days or less before the "Job Start Date" of this Employment Record, then find the participant's last unsubsidized placement with a "Job Start Date" at least 31 days after the "Job End Date" of the preceding unsubsidized placement, and that "Job Start Date" + 270 days must fall in the report period to be included here. "Achieved (Numerator)" column: The unduplicated count of participants in the "Eligible (Denominator)" column in this row with an Advancement, on at least one of the Employment Record(s) with "Unsubsidized Job" selected in "Wage Type" and no check in the "Client had this job before enrollment" box that make up any part of the chain of such Employment Record(s) with gaps of no more than 30 days between them, with a "Status" of "Verified retention" and a "Date" that is on or after the "Job Start Date" of the participant's first unsubsidized placement in the chain of unsubsidized placements with no more than 30 days between them + 270 days. (The Advancement Date may be after the report period).

- **(E24) Achieved 365-day steady employment during the report period:** Eligible (Denominator) column: The unduplicated count of participants who have an Employment record that has "Unsubsidized Job" selected in "Wage Type", the "Client had this job before enrollment" box is NOT checked, and the "Job End Date" is blank or there is at least one day during the report period that falls before the date in the "Job End Date" AND the "Job Start Date" + 365 days falls during the report period, EXCEPT: if a participant has a prior Employment Record with "Unsubsidized Job" selected for "Wage Type", the "Client had this job before enrollment" box is not checked, and the "Job End Date" is 30 days or less before the "Job Start Date" of this Employment Record, then find the participant's last unsubsidized placement with a "Job Start Date" at least 31 days after the "Job End Date" of the preceding unsubsidized placement, and that "Job Start Date" + 365 days must fall in the report period to be included here. "Achieved (Numerator)" column: The unduplicated count of participants in the "Eligible (Denominator)" column in this row with an Advancement, on at least one of the Employment Record(s) with "Unsubsidized Job" selected in "Wage Type" and no check in the "Client had this job before enrollment" box that make up any part of the chain of such Employment Record(s) with gaps of no more than 30 days between them, with a "Status" of "Verified retention" and a "Date" that is on or after the "Job Start Date" of the participant's first unsubsidized placement in the chain of unsubsidized

placements with no more than 30 days between them + 365 days. (The Advancement Date may be after the report period).

(E25) Total # of people in Retention (steady employment across placements) who achieved at least one retention benchmark during the report period: The unduplicated count of participants in the "Retention: steady employment across placements (excluding previous employment)" section (lines E20-E24).

(E26) Total # of placements (among unsubsidized jobs only): The total number of employment records (duplicated number) with a "Job Start" date during the report period that are NOT marked as "Client had this job before enrollment" AND have a value of "Unsubsidized Job" as the "Wage Type" on the employment record.

> **(E27) Part-time placements (34 hours/week or less):** Subset of E26, the number of employment records with a number less than or equal to ""34"" entered as the first number ever in the "Hours Per Week" field on such employment record. If the employment record is updated as an Advancement with a change in hours, this update will NOT change where the placement is reported in these lines.
> **(E28) Full-time placements (35 hours/week or more):** Subset of E26, the number of employment records with a number greater than or equal to ""35"" entered as the first number ever in the "Hours Per Week" field on such employment record. If the employment record is updated as an Advancement with a change in hours, this update will NOT change where the placement is reported in these lines."
> **(E29) Hours per week unknown:** Subset of E26, the number of employment records with a null value entered in the "Hours Per Week" field on such employment record. If the employment record is updated as an Advancement with a change in hours, this update will NOT change where the placement is reported in these lines.

(E30) Placement Rate (%): The unduplicated count of people in the total "People working on Employment Search Story", who have at least one Employment Record that has a "Job Start Date" during the report period, does not have the "Client had this job before enrollment" box checked, and have either "Subsidized/Stipend Job" or "Unsubsidized Job" selected in the Wage Type field.

FICO Credit Score Status

(E31-E31a) #/% with a FICO credit Score of 650 or greater: The unduplicated count of people in the "Total # of people in Retention (steady employment across placements) who achieved at least one retention benchmark during the report period" line who have a FICO credit score equal to or greater than 650 on their most recent "Credit Report" assessment submitted with a date before or during the report period.

Education/Training Outcomes

(E32) People enrolled in Education/Training: The unduplicated count of participants with at least one Education/Training Program record that is not marked as "Client began this edu. program pre-FOC" and that has a Start Date during the report period.

(E33) People who attended Education/Training (VERIFIED w/in 6 mos. of the report end date): The unduplicated count of participants with at least one Education/Training Program record with all of the following: (1) a "Start date" before or during the report period, (2) no "End date" before the report period; and (3) at least one of the following no earlier than 6 months before the end date of the report period: a "Start date" on the Education/Training Program record in question and/or a "Date" on an Education Progress Record on the Education/Training Program record in question with a "Status" of "Attending regularly".

(E34) People who completed Education/Training: The unduplicated count of participants with at least one Education/Training Program record with an "Exit status" of "Completed program" and an "End date" during the report period.

BRIDGES TO CAREER OPPORTUNITIES

(E35) Total # of training participants ever enrolled: The unduplicated count of participants who have at least one Education/Training Program record with any value selected in the "BCO education/training level" field AND a start date before or during the report period. EXCUDES "Client began this edu. program pre-FOC".

(E36) Participants who began a BCO education/training program during the report period: The unduplicated count of participants who have an Education/Training Program Record with (1) a "Start date" during the report period AND (2) any value in the "BCO education/training level" field. EXCLUDES "Client began this edu. program pre-FOC"

> **(E37) Participants who began a contextualized bridge education program:** The unduplicated count of participants from line E36 who have an Education/Training Program Record with a "Start date" during the report period AND a value of "Contextualized bridge education program" in the "BCO education/training level" field.

> **(E38) Participants who began an occupational skills training program:** The unduplicated count of participants from line E36 who have a value of "Occupational skills training program" in the "BCO education/training level" field on any Education/Training Program Record.

> **(E39) Participants who began a college degree program:** The unduplicated count of participants in line E36 who have a value of "College degree program" in the "BCO education/training level" field on any Education/Training Program Record.

(E40) Participants who completed a BCO education/training program: The unduplicated count of participants who have an Education/Training Program Record with: (1) a date in the "End date" field that is during the report period, (2) a value of "Completed program" in the "Exit status" field, and (3) a "BCO education/training level" field that is not null. EXCUDES "Client began this edu. program pre-FOC".

> **(E41) Participants who completed a contextualized bridge education program**: The unduplicated count of participants from line E40 who have an Education/Training Program Record with: (1) a date in the "End date" field that is during the report period, (2) a value of "Completed program" in the "Exit status" field, and (3) a "BCO education/training level" field with a value of "Contextualized bridge education program".

(E42) participants who completed an occupational skills training program: The unduplicated count of participants from line E40 who have an Education/Training Program Record with: (1) a date in the "End date" field that is during the report period, (2) a value of "Completed program" in the "Exit status" field, and (3) a "BCO education/training level" field with a value of "occupational skills training program ".

(E43) participants who completed a college degree program: The unduplicated count of participants from line E43 who have an Education/Training Program Record with: (1) a date in the "End date" field that is during the report period, (2) a value of "Completed program" in the "Exit status" field, and (3) a "BCO education/training level" field with a value of " college degree program".

(E44) Participants who attained an industry-recognized credential: The unduplicated count of participants with a Degree/Certificate/License Record with a date in the "Date degree/certificate/license obtained" field during the report period.

(E45) Number of credentials obtained by training participants: The duplicated number of Degree/Certificate/License Records for participants in line E44.

(E46) Training participants placed in jobs overall (including those who obtained employment outside of the targeted career pathway): The unduplicated count of participants with an Employment Record with all of the following: (1) a "Job Start Date" that is both during the report period and on or after the most recent "Start Date" on the "Education/Training Program" record EXCUDES "Client began this edu. program pre-FOC". , (2) a "Wage Type" of "Unsubsidized Job" or "Subsidized/Stipend Job", (3) the "Client had this job before enrollment" box is NOT checked, and (4) the "Is this job an internship?" box is NOT checked.

(E47) Training participants placed in jobs in the targeted career pathway only: The unduplicated count of participants who have a value in the "Industry Focus" or "Industry cluster" field on the Employment Record that triggered inclusion in line E46 that matches the value in the "Industry Focus" or "Industry cluster" field on any Education/Training Program Record for that participant EXCUDES "Client began this edu. program pre-FOC". The participant may have a match in one of the fields in question but not the other, or they may have a match in both fields.

(E48) Average starting wage at initial sector placement among training participants: Among the participants in line E47, the average of the value in "Hourly Wage ($)" on the participant's first Employment Record with a "Job Start Date" during the report period and on or after the most recent "Start Date" on the "Education/Training Program" record with any value in the "BCO education/training level" field EXCUDES "Client began this edu. program pre-FOC". If the participant has an Employment Record with a "Start date" before the report period and on or after the "Start Date" on the "Education/Training Program" record with a value matching [Employment record] "Industry Focus" and [Education record] "Career Cluster", do NOT include that participant in this line.

(E49) Average starting wage at initial sector placement among training completers: Among the participants in E48 who have an "Exit status" of "Completed program" on an Education/Training Program Record with any value selected in the "BCO education/training level" field, the average of the value in "Hourly Wage ($)" on the

participant's first Employment Record with a "Job Start Date" during the report period and on or after the "End date" of any Education/Training Program Record with an "Exit status" of "Completed program" and any value selected in the "BCO education/training level" field. If the participant has an Employment Record with a "Start date" before the report period and on or after the "End date" of an Education/Training Program Record with an "Exit status" of "Completed program" and any value in the "BCO education/training level", do NOT include that participant in this line.

(E50) Average most recent wage among training participants, excluding initial wage: Among the participants in line E35, the average of the most recent "Current Hourly Wage" on an Advancement with a "Date of change in employment" during the report period on an Employment Record with a "Job Start Date" on or after the most recent "Start Date" on the "Education/Training Program" record EXCUDES "Client began this edu. program pre-FOC". If a participant has more than one such Advancement, only count the most recent updated wage on the highest paying job. If a participant has 2 jobs during the report period, and there is an increase in wages in the lower-paying job but no increase in the still highest-paying job, do not include that participant's wage in this average.

> **(E51) Average most recent wage among training completers, excluding initial wage:** Among the participants in line E50 who have an "Exit status" of "Completed program" on an Education/Training Program Record with any value selected in the "BCO education/training level" field, the average of the most recent "Current Hourly Wage" on an Advancement with a "Date of change in employment" during the report period. If a participant has more than one such Advancement, only count the most recent updated wage on the highest paying job. If a participant has 2 jobs during the report period, and there is an increase in wages in the lower-paying job but no increase in the still highest-paying job, do not include that participant's wage in this average.

(E52) Average increase from initial wage to most recent wage among training participants: Among the participants in line E35, the average of the following for each participant: the difference between the most recent "Current Hourly Wage" on an Advancement with a "Date of change in employment" during the report period and that participant's starting "Hourly Wage ($)" on the participant's first Employment Record with a "Job Start Date" during or before the report period and on or after the most recent "Start Date" on the "Education/Training" record. If a participant has more than one job with an Advancement in both, or more during the report period, calculate the difference using the highest wage, even if the lower paying job had the increase more recently.

> **(E53) Average increase from initial wage to most recent wage among training completers:** Among the participants in line E52 who have an "Exit status" of "Completed program" on an Education/Training Program Record with any value in the "BCO education/training level" , the average of the following for each participant: the difference between the most recent "Current Hourly Wage" on an Advancement with a "Date of change in employment" during the report period and that participant's starting "Hourly Wage ($)" on the participant's first Employment Record with a "Job Start Date" during or before the report period. If a participant has more than one job with an Advancement during the report period, calculate the difference using the highest wage, even if the lower paying job had the increase more recently.

(E54) Training participants who obtained internships: The unduplicated count of participants in line E35 who have an Employment Record with all of the following: (1) a "Job Start Date" during the report period; (2) the "Client had this job before enrollment" box is not checked; (3) a value of "Yes" in the "is this job an Internship?" field.

(E55) Training participants obtaining promotions/advancements: The unduplicated count of Advancements for participants in line E50 that have all of the following: (1) a "Date of change in employment" during the report period; (2) a value of "Increase in hours", "Increase in wages", and/or "Obtained promotion" in the "Status" field.

(E56) Training participants participating in employability (soft) skills training: The unduplicated count of training participants who have any of the following: 1) a "Start Date" in an Education/Training program record with a value selected in the "BCO education/training level" during the report period, 2) a "Job Start Date" during the report period EXCLUDES previous jobs 3) a "Date" in an Employment Counseling service entry with a value of "Yes" in "Reach the person you attempted to contact".

(E57) Training participants receiving retention/advancement coaching: The unduplicated count of training participants who have a "Date" in an Advancement with any of the following statuses: 1)"Verified Retention" , 2) "Obtained Promotion", 3) "Increase in Wages", 4) "Increase in Hours" during the report period OR a "Date" in an Employment Counseling service entry with "Retention Support" during the report period.

(E58) Training participants achieving 30-day job retention: Eligible (Denominator) column: The unduplicated count of participants who have an Employment record that has "Unsubsidized Job" selected in "Wage Type", the "Client had this job before enrollment" box is NOT checked, and the "Job End Date" is blank or there is at least one day during the report period that falls before the date in the "Job End Date" AND the "Job Start Date" + 30 days falls during the report period, EXCEPT: if a participant has a prior Employment Record with "Unsubsidized Job" selected for "Wage Type", the "Client had this job before enrollment" box is not checked, and the "Job End Date" is 30 days or less before the "Job Start Date" of this Employment Record, then find the participant's last unsubsidized placement with a "Job Start Date" at least 31 days after the "Job End Date" of the preceding unsubsidized placement, and that "Job Start Date" + 30 days must fall in the report period to be included here. "Achieved (Numerator)" column: The unduplicated count of participants in the "Eligible (Denominator)" column in this row with an Advancement, on at least one of the Employment Record(s) with "Unsubsidized Job" selected in "Wage Type" and no check in the "Client had this job before enrollment" box that make up any part of the chain of such Employment Record(s) with gaps of no more than 30 days between them, with a "Status" of "Verified retention" and a "Date" that is on or after the "Job Start Date" of the participant's first unsubsidized placement in the chain of unsubsidized placements with no more than 30 days between them + 30 days (The Advancement Date may be after the report period) AND a "Start Date" during, or before the report period in an Education/Training Program record with any of the following BCO education/training level: 1) Contextualized bridge education program, 2) Occupational skills training program, 3) College degree program.

 (E59) Training participants achieving 180-day job retention: Eligible (Denominator) column: The unduplicated count of participants who have an Employment record that has "Unsubsidized Job" selected in "Wage Type", the "Client had this job before enrollment" box is NOT checked, and the "Job End Date" is blank or there is at least one day during the report period that falls before the date in the "Job End Date" AND the "Job Start Date" + 180 days falls during the report period, EXCEPT: if a participant has a prior Employment Record with "Unsubsidized Job" selected for "Wage Type", the "Client had this job before enrollment" box is not checked, and the "Job End Date" is 30 days or less before the "Job Start Date" of this Employment Record, then find the participant's last unsubsidized placement with a "Job Start Date" at least 31 days after the "Job End Date" of the preceding unsubsidized placement, and that "Job Start Date" + 180 days must fall in the report period to be included here. "Achieved (Numerator)" column: The unduplicated count of participants in the "Eligible (Denominator)" column in this row with an Advancement, on at least one of the Employment Record(s) with "Unsubsidized Job" selected in "Wage Type" and no check in the "Client had this job before enrollment" box that make up any part of the chain of such Employment Record(s) with gaps of no more than 30 days between them, with a "Status" of "Verified retention" and a "Date" that is on or after the "Job Start Date" of the participant's first unsubsidized placement in the chain of unsubsidized placements with no more than 30 days between them + 180 days (The Advancement Date may be after the report period) AND a "Start Date" during, or before the report period in an Education/Training Program record with any of the following BCO education/training level: 1) Contextualized bridge education program, 2) Occupational skills training program, 3) College degree program.

 (E60) Training participants achieving 365-day job retention: Eligible (Denominator) column: The unduplicated count of participants who have an Employment record that has "Unsubsidized Job" selected in "Wage Type", the "Client had this job before enrollment" box is NOT checked, and the "Job End Date" is blank or there is at least one day during the report period that falls before the date in the "Job End Date" AND the "Job Start Date" + 365 days falls during the report period, EXCEPT: if a participant has a prior Employment Record with "Unsubsidized Job" selected for "Wage Type", the "Client had this job before enrollment" box is not checked, and the "Job End Date" is 30 days or less before the "Job Start Date" of this Employment Record, then find the participant's last unsubsidized placement with a "Job Start Date" at least 31 days after the "Job End Date" of the preceding unsubsidized placement, and that "Job Start Date" + 365 days must fall in the report period to be included here. "Achieved (Numerator)" column: The unduplicated count of participants in the "Eligible (Denominator)" column in this row with an Advancement, on at least one of the Employment Record(s) with "Unsubsidized Job" selected in "Wage Type" and no check in the "Client had this job before enrollment" box that make up any part of the chain of such Employment Record(s) with gaps of no more than 30 days between them, with a "Status" of "Verified retention" and a "Date" that is on or after the "Job Start Date" of the participant's first unsubsidized placement in the chain of unsubsidized placements with no more than 30 days between them + 365 days. (The Advancement Date may be after the report period) AND a "Start Date" during, or before the report period in an Education/Training Program record with any of the following BCO education/training level: 1) Contextualized bridge education program, 2) Occupational skills training program, 3) College degree program.

(E61) Training participants achieving 2-year job retention: Eligible (Denominator) column: The unduplicated count of participants who have an Employment record that has "Unsubsidized Job" selected in "Wage Type", the "Client had this job before enrollment" box is NOT checked, and the "Job End Date" is blank or there is at least one day during the report period that falls before the date in the "Job End Date" AND the "Job Start Date" + 730 days falls during the report period, EXCEPT: if a participant has a prior Employment Record with "Unsubsidized Job" selected for "Wage Type", the "Client had this job before enrollment" box is not checked, and the "Job End Date" is 30 days or less before the "Job Start Date" of this Employment Record, then find the participant's last unsubsidized placement with a "Job Start Date" at least 31 days after the "Job End Date" of the preceding unsubsidized placement, and that "Job Start Date" + 730 days must fall in the report period to be included here. "Achieved (Numerator)" column: The unduplicated count of participants in the "Eligible (Denominator)" column in this row with an Advancement, on at least one of the Employment Record(s) with "Unsubsidized Job" selected in "Wage Type" and no check in the "Client had this job before enrollment" box that make up any part of the chain of such Employment Record(s) with gaps of no more than 30 days between them, with a "Status" of "Verified retention" and a "Date" that is on or after the "Job Start Date" of the participant's first unsubsidized placement in the chain of unsubsidized placements with no more than 30 days between them + 730 days. (The Advancement Date may be after the report period) AND a "Start Date" during, or before the report period in an Education/Training Program record with any of the following BCO education/training level: 1) Contextualized bridge education program, 2) Occupational skills training program, 3) College degree program.

(E61a) Training participants achieving 3-year job retention: Eligible (Denominator) column: The unduplicated count of participants who have an Employment record that has "Unsubsidized Job" selected in "Wage Type", the "Client had this job before enrollment" box is NOT checked, and the "Job End Date" is blank or there is at least one day during the report period that falls before the date in the "Job End Date" AND the "Job Start Date" + 1095 days falls during the report period, EXCEPT: if a participant has a prior Employment Record with "Unsubsidized Job" selected for "Wage Type", the "Client had this job before enrollment" box is not checked, and the "Job End Date" is 30 days or less before the "Job Start Date" of this Employment Record, then find the participant's last unsubsidized placement with a "Job Start Date" at least 31 days after the "Job End Date" of the preceding unsubsidized placement, and that "Job Start Date" + 1095 days must fall in the report period to be included here. "Achieved (Numerator)" column: The unduplicated count of participants in the "Eligible (Denominator)" column in this row with an Advancement, on at least one of the Employment Record(s) with "Unsubsidized Job" selected in "Wage Type" and no check in the "Client had this job before enrollment" box that make up any part of the chain of such Employment Record(s) with gaps of no more than 30 days between them, with a "Status" of "Verified retention" and a "Date" that is on or after the "Job Start Date" of the participant's first unsubsidized placement in the chain of unsubsidized placements with no more than 30 days between them + 1095 days. (The Advancement Date may be after the report period) AND a "Start Date" during, or before the report period in an Education/Training Program record with any of the following BCO education/training level: 1) Contextualized bridge education program, 2) Occupational skills training program, 3) College degree program.

Financial Stability Outcomes for Training Participants

(E62) Training participants with at least one bureau showing an improved FICO credit score: The unduplicated count of participants in line F22 who have at least one Education/Training Program record with a value in the "BCO education/training level" field with a start date before or during the report period EXCUDES "Client began this edu. program pre-FOC", and the date of the improvement in the credit score is on or after the "Start Date" on the participant's first BCO Education/Training record.

(E63) Training participants with Monthly Net Income (NI) going up: The unduplicated count of participants in line F31 who have at least one Education/Training Program record with a value in the "BCO education/training level" field with a start date before or during the report period EXCUDES "Client began this edu. program pre-FOC", and the date of the increase in Monthly Net Income is on or after the "Start Date" on the participant's first BCO Education/Training record.

(E64) Training participants with Net Worth (NW) going up: The unduplicated count of participants in line F33 who have at least one Education/Training Program record with any value in the "BCO education/training level" field with a start date before or during the report period EXCUDES "Client began this edu. program pre-FOC", and the date of the increase in Net Worth is on or after the "Start Date" on the participant's first BCO Education/Training record.

(E65) Training participants with at least one key financial outcome: The unduplicated count of training participants who had an increase in Net Income, Net Worth, and/or FICO Score during the report period.

(E66) Training participants with at least one key financial outcome and/or job placement: The unduplicated count of training participants who had an increase in Net Income, Net Worth, FICO Score and/or job placement during the report period.

(E67) Training Participants w/ Counseling or Workshop service in report period AND Counseling since enrollment: The unduplicated count of training participants who got at least one FFT Service minus any training participants who have only ever had Workshop/Class Service(s).

(E68) Total # of training participants who got exactly 3/3 FFT services: The unduplicated count of training participants who have BOTH of the following: (A) at least one service that triggers inclusion in line E2, I2, or F2 AND/OR a Workshop/Class Group Service with a value in the "Type of Workshop/Class" field that is NOT "Digital Literacy Workshop" or "Other" during the report period; AND (B) service in ALL THREE service areas (Employment, Income Supports, Financial) since enrollment in the Financial Opportunity Center, meaning they fall into ALL THREE of the following categories: (1) EC/EW: they have ever had a service that triggers inclusion in line E2 and/or have had a Workshop/Class Group service entry with "Employment/Education Workshop" or "Vocational Training Class" selected in the "Type of

Workshop/Class" field; (2) IC/IW: they have ever had a service that triggers inclusion in line I2 and/or have had a Workshop/Class Group service entry with "Income Supports Workshop" selected in the "Type of Workshop/Class" field; AND (3) FC/FW: they have ever had a service that triggers inclusion in line F2 and/or have had a Workshop/Class Group service entry with "Financial Workshop" selected in the "Type of Workshop/Class" field.

(E69) Total % of Training participants receiving all 3 supportive services: The number of training participants who got exactly 3/3 FFT services divided by the number of training participants w/ counseling or workshop service in report period AND counseling since enrollment.

Measurable Skills Gain

(E70) Participants achieving a measurable skills gains: unduplicated count of participants who, during the report period, achieve measurable skills gains, defined by the completion of an education/training program (E34) OR any of the following:

(E70a) Educational Functioning Level: The unduplicated count of training participants with a TOTAL value in any of the following three fields: 1) "TABE Language Scale Score", 2) " TABE Reading Scale Score", and 3) " TABE Math Scale Score"

OR a TOTAL value in any of the following seven fields: 1)"ACT WorkKeys Applied Math ", 2) " WorkKeys Applied Technology Score ", 3) "WorkKeys Business Writing Score", 4) "WorkKeys Listening for Understanding Score", 5) "ACT WorkKeys Graphic Literacy", 6) "ACT WorkKeys Workplace Documents", and 7) "WorkKeys Workplace Observation Score"

OR a TOTAL value in any of the following two fields: 1)"GAIN English Score" and 2) "GAIN Math Score"

OR a TOTAL value in any of the following two fields: 1) "CASAS Reading Scale Score" , 2) "CASAS Math Scale Score "

OR a TOTAL value in any of the following five fields: 1) "ACCUPLACER Arithmetic Score", 2) "ACCUPLACER College-Level Math Score", 3) "ACCUPLACER Elementary Algebra Score", 4) "ACCUPLACER Reading Score", and 5) "ACCUPLACER Sentence Skills Score" -- with an educational functioning level as described by the National Reporting System for Adult Education (2019) on the MOST RECENT subsequent assessment, with an "Assessment Date" during the report period, that has a greater educational functioning level than the baseline assessment. If a participant has an increase in score for the TABE assessments with a given value in the "TABE Form" field but not in the TABE assessments with the other value in the "TABE Form" field, they should not be included in this line.

(E70b) Participants passing an occupational exam: The unduplicated count of training participants who have a "Date" during the report period in an Employment Counseling service entry with an "Exam" topic, a value of "Yes" in "Reach the person you attempted to contact" and any of the following statuses; 1) Passed exam, 2) Passed part of the exam, 3) Obtained degree/certificate/license (create Degree/Certificate/License Record).

(E70c) Participants who complete secondary school diploma or equivalency: The unduplicated count of training participants who have either one of the following:

- An "Education/Training Program Record" with: (1) a date in the "End date" field that is during the report period, (2) a value of "Completed program" in the "Exit status" field, and (3) a "Education/training placement level" field with the value of "High school diploma (traditional/alternative)" OR "Adult Education - HSE (GED/HiSet/TASC)" and does NOT have the "Client began this edu. program pre-FOC " box checked.

- A "Certificate/Degree/License Record" with a date in "Date degree/certificate/license obtained" during the report period and a "Degree/certificate obtained" in any of the following: "High school diploma (Traditional/alternative)", "GED Credential" , "HiSet credential" , " TASC credential" and does NOT have the "Client had this credential pre-FOC" box checked.

INCOME SUPPORTS COUNSELING (ISC)

(I1) People who got service for the first time: The unduplicated count of participants who have NEVER had any of the services before the report period.
- A "Date" on an Income Supports Counseling service entry.
- A "Referral Date" on an Outbound Referral with any of the following selected in the "Referral Reason(s)" field: "Income support services", "Food pantry", or "Housing/shelter".

(I2) People who got at least one service: The unduplicated count of participants who have at least one of the following during the report period:
- A "Date" on an Income Supports Counseling service entry.
- A "Referral Date" on an Outbound Referral with any of the following selected in the "Referral Reason(s)" field: "Income support services", "Food pantry", or "Housing/shelter".

(I3) People screened (or attempted to screen) for benefits: The unduplicated count of participants who have at least one Income Supports Counseling Service Entry with a value that is not null entered in the "General Benefits Screening Results" field and a "Date" during the report period.

> **(I3a) People who declined screening:** The unduplicated count of participants who have "Declined Screening" selected in the "General Benefits Screening field" on at least one Income Supports Counseling Service Entry with a "Date" during the report period.

> **(I3b) People who did not complete screening:** The unduplicated count of participants who have "Did not complete screening" selected in the "General Benefits Screening field" on at least one Income Supports Counseling Service Entry with a "Date" during the report period.

(I3c) People who are receiving all available benefits at this time: The unduplicated count of participants who have "Client receiving all available benefits at this time" selected in the "General Benefits Screening field" on at least one Income Supports Counseling Service Entry with a "Date" during the report period.

(I3d) People who are not eligible for any benefits: The unduplicated count of participants who have "Completed screening: not eligible for any benefits" selected in the "General Benefits Screening field" on at least one Income Supports Counseling Service Entry with a "Date" during the report period

(I4) People eligible for at least one benefit (at time of last screening): The unduplicated count of participants who have "Completed Screening: eligible for at least one benefit" selected in the "General Benefits Screening field" on at least one Income Supports Counseling Service Entry with a "Date" during the report period.

(I5) People who applied (or re-applied) for at least one benefit: The unduplicated count of participants who have at least one Income Supports Counseling Service Entry with at least one service with a Status of "Applied (or re-applied)" with a "Date" during the report period.

(I6) People who were approved (or re-approved) for at least one benefit: The unduplicated count of participants who have at least one Income Supports Counseling Service Entry with at least one service with a Status of "Approved (or re-approved)" with a "Date" during the report period.

(I7) People with new or changed recurring benefit/subsidy amount: The unduplicated count of participants with an Income Supports Counseling service entry with a "Date" during the report period with at least one service with BOTH of the following:

(1) A "Status" of "Approved (or re-approved)" or "Receiving benefit/subsidy - change in amount". For a service with the "Approved (or re-approved)" status to count in this line, the value in the "Amount of Benefit/Subsidy" field on that service must not be equal to the most recent prior value entered in that field on that service. *Note 1: A blank value in the "Amount of Benefit/Subsidy" field is treated the same as a 0 value. For example, a service with an "Approved (or re-approved)" status with a blank "Amount of Benefit/Subsidy" field will not show in this line if the most recent prior status on that service of "Approved (or re-approved)" or "Receiving benefit/subsidy – change in amount" had a blank or 0 in "Amount of Benefit/Subsidy". *Note 3: If an entry is the first time a particular service with a particular "Name of Entity" was submitted with a "Status" of "Approved (or re-approved)" or "Receiving benefit/subsidy - change in amount" for a participant, then that entry should be included here. *Note 4: A service with the "Receiving benefit/subsidy - change in amount" value will always count in this line, regardless of the amount in the "Amount of Benefit/Subsidy" field.

(2) a value beginning with "Every..." in the "Frequency of Payment" field. *Note: If a service mistakenly has BOTH the "Every..." and "One time" values selected in the "Frequency of Payment" field at different times, this line will ignore the "One time" submissions and treat the "Every..." submissions according to these rules listed.

(I8) People with subsequent BUDGETs completed for most recent new/changed recurrent benefit/subsidy amount during report period: The unduplicated count of participants who have a Subsequent Budget assessment with an "Assessment Date" ON or AFTER the "Date" of the most recent new or changed recurring benefit/subsidy.

> **(I9) People with Net Income going up:** The unduplicated count of participants who have a value in the "Total Monthly Net Income" on the last dated Budget assessment during the report period that is GREATER than the value in the "Total Monthly Net Income" on the participant's baseline (first ever) Budget assessment.

(I10) Total $ value of approved (or re-approved) Income Supports (annualized value for recurring benefits): This line pulls from any Income Supports Counseling story on a Service Entry with an "Approved (or re-approved)"or "Receiving benefit/subsidy – change in amount" value in the "Status" field with a date during the report period. The line reports the sum of the amounts recorded in the "Amount of Benefit/Subsidy" field for those with the "One time" value selected in the "Frequency of Payment/Subsidy" field plus the annualized value of the amounts in the "Amount of Benefit/Subsidy" field with any other value selected in the "Frequency of Payment/Subsidy" field. To annualize the values, use the following multipliers of the "Value of Benefit/Subsidy": 52 for "Every week", 26 for "Every two weeks", 12 for "Every month", 6 for "Every two months", 4 for "Every three months", 2 for "Every six months", 1 for "Every year". If nothing is selected in the "Frequency of Payment/Subsidy" field, then do not use a multiplier (assume one-time). If a participant has the same story entered more than once in the report period, then (a) for those with a "One time" value selected in the "Frequency of Payment/Subsidy" field, each entered "Amount of Benefit/Subsidy" is added in the total, but (b) for those with any other value in the "Frequency of Payment/Subsidy" field, only the most recent "Amount of Benefit/Subsidy" during the report period is included here. Please note that stories with different values in the "Name of Entity", "Type of medical benefit/subsidy", and/or "Type of Recurring Cash Assist/Payments" fields are considered different stories and should be counted separately. For example, if a participant has a Recurring Cash Assistance/Payments story with "TANF" selected in the "Type of Recurring Cash Assist/Payments" field and another Recurring Cash Assistance/Payments story with "Other" selected in the "Type of Recurring Cash Assist/Payments" field, then those stories should both be counted here (assuming they have an "Approved (or re-approved)" or "Receiving benefit/subsidy - change in amount" value in the "Status" field with a date during the report period).

FINANCIAL COUNSELING (FC)

(F1) People who got service for the first time: The unduplicated count of participants who have NEVER had any of the services listed before the report period.
- An "Assessment Date" on a Financial Health, Budget, Credit Report, or Balance Sheet assessment.
- A "Date" on a Financial Counseling service entry.
- A "Start date" or "End date" on an Action Plan.
- An "Actual Completion Date" on an ECM Goal on an Action Plan.
- A "Referral Date" on an Outbound Referral with "Financial Services" selected in the "Referral Reason(s)" field.

(F2) People who got at least one service: The unduplicated count of participants who have at least one of the following during the report period:

- An "Assessment Date" on a Financial Health, Budget, Credit Report, or Balance Sheet assessment.
- A "Date" on a Financial Counseling service entry.
- A "Start date" or "End date" on an Action Plan.
- An "Actual Completion Date" on an ECM Goal on an Action Plan.
- A "Referral Date" on an Outbound Referral with "Financial Services" selected in the "Referral Reason(s)" field.

(F3) People who had at least one direct counseling contact: The unduplicated count of participants who have at least one Financial Counseling Service Entry with a "Date" during the report period, "Yes" in the "Reach person you attempted to contact?" field, and "Client" in the "Contact with" field.

(F4-F6) Frequency of Counseling Contact (since enrollment, among people with at least one direct counseling contact during the report period):

- **1 time only:** The count of participants with EXACTLY one Financial Counseling Service Entry with "Yes" in the "Reach person you attempted to contact?" field, "Client" in the "Contact with" field, and a "Date" that is on or after the "Enrolled Date" on the participant's Case Record and on or before the end date of the report period.

- **2-4 times exactly:** The count of participants with EXACTLY two, three, or four Financial Counseling Service Entries with "Yes" in the "Reach person you attempted to contact?" field, "Client" in the "Contact with" field, and a "Date" that is on or after the "Enrolled Date" on the participant's Case Record and on or before the end date of the report period.

- **5 or more times:** The count of participants with five or more Financial Counseling Service Entries with "Yes" in the "Reach person you attempted to contact?" field, "Client" in the "Contact with" field, and a "Date" that is on or after the "Enrolled Date" on the participant's Case Record and on or before the end date of the report period.

(F7) People submitting at least one baseline financial assessment: The unduplicated count of participants who have a FIRST EVER of any of the following assessments with an "Assessment Date" during the report period: Financial Health, Credit Report, Budget, and/or Balance Sheet. If the participant had any of these objects with an "Assessment Date" before the report period, do NOT include him/her in this line. It does not matter whether the participant has a subsequent assessment during the report period.

> **(F8) Financial Health:** The unduplicated count of participants who have the FIRST ever Financial Health assessment with an "Assessment Date" during the report period.

> **(F9) Credit Reports:** The unduplicated count of participants who have the FIRST ever Credit Report assessment with an "Assessment Date" during the report period.

> > **(F10) People with FICO credit score available:** The unduplicated count of participants who have a 3-digit score entered in any "...FICO Score" field (Experian

FICO Score, Equifax FICO Score, TransUnion FICO Score, or Other FICO Score) on the participant's FIRST EVER Credit Report assessment.

(F11) Budgets: The unduplicated count of participants who have the FIRST ever Budget assessment with an "Assessment Date" during the report period.

(F12) Balance Sheets: The unduplicated count of participants who have the FIRST ever Balance Sheet assessment with an "Assessment Date" during the report period.

(F13) People due for a subsequent Credit Report pull at report period end: The unduplicated count of participants with all of the following: (1) at least one Credit Report assessment with the "Every 6 months for 5 years" value selected in any "...Authorization Status" field with a date in the "Date...Authorization Signed" on the same bureau that is no earlier than 5 years prior to the end date of the report (OR if there is no date in any "Date...Authorization Signed" field on any of the participant's Credit Report assessment(s), the "Assessment Date" on the participant's first Credit Report assessment with the "Every 6 months for 5 years" value selected in any "...Authorization Status" field is no earlier than 5 years prior to the end date of the report); (2) no Credit Report assessment with the "Withdrew multi-pull authorization (every 6 months for 5 years)" value selected in any "...Authorization Status" field with an "Assessment Date" on or after the "Assessment Date" of a Credit Report assessment that meets the criteria in (1); and (3) no "Exit Date" on the participant's Case Record with a date before or during the report period.

(F14) People who received at least 1 FFT Counseling service during 18 months prior to report end date: The unduplicated count of participants with at least one Employment Counseling, Income Supports Counseling, or Financial Counseling Service Entry with a "Date" during the 18 months prior to the end date of the report period, "Yes" in the "Reach person you attempted to contact?" field, and "Client" in the "Contact with" field.

(F15) People submitting at least one subsequent financial assessment: The unduplicated count of participants who have a SUBSEQUENT (Intermediate or Latest) of any of the following assessments with an "Assessment Date" during the report period: Financial Health, Credit Report, Budget, and/or Balance Sheet.

(F16) Financial Health: The unduplicated count of participants who have a SUBSEQUENT (Intermediate or Latest) Financial Health assessment with an "Assessment Date" during the report period.

(F17) Credit Reports: The unduplicated count of participants who have a SUBSEQUENT (Intermediate or Latest) Credit Report assessment with an "Assessment Date" during the report period.

(F18) People with FICO Credit Score available: The unduplicated count of participants who have a 3-digit score in any "…FICO Score" field (Experian FICO Score, Equifax FICO Score, TransUnion FICO Score, or Other FICO Score) on any SUBSEQUENT (Intermediate or Latest) Credit Report assessment with an "Assessment Date" during the report period.

(F19) Budgets: The unduplicated count of participants who have a SUBSEQUENT (Intermediate or Latest) Budget assessment with an "Assessment Date" during the report period.

(F20) Balance Sheets: The unduplicated count of participants who have a SUBSEQUENT (Intermediate or Latest) Balance Sheet assessment with an "Assessment Date" during the report period.

> **(F20a) # of clients who reduced <u>total</u> liabilities by at least $1,000:** Among the participants with an updated balance sheet, the unduplicated count of people who have a TOTAL value in "Total Liabilities" on the MOST RECENT subsequent Balance Sheet assessment with an "Assessment Date" during the report period that is LESSER THAN the TOTAL value in "Total Liabilities" FIRST ever Balance Sheet assessment. Compare only Balance Sheet assessments with the same value in the "Bal Sheet reflects own finances/whole HH" field. If a participant has at least one record marked as "Balance sheet reflects participant only or a household of one" and at least one marked as "Balance sheet reflects whole household", then compare the participant's first ever Balance Sheet assessment with a given value in the "Bal Sheet reflects own finances/whole HH" field with the most recent subsequent Balance Sheet assessment with an "Assessment Date" during the report period with the same value in the "Bal Sheet reflects own finances/whole HH" field.

(F21) People with an Action Plan: The unduplicated count of participants who have at least one Action Plan with a "Start Date" during the report period.

<u>Financial Stability Outcomes</u>

(F22) People with at least one bureau showing an improved FICO credit score: The unduplicated count of participants for whom the MOST RECENT Credit Report assessment with a date during the report period has ANY of the following: (1) a 3-digit number in the "...FICO Score" field in the SAME Bureau that has a value of "No score available (insufficient credit history)" in the "...FICO Score Status" field on the BASELINE Credit Report assessment; OR (2) a 3-digit number in the "...FICO Score" field in a given Bureau that is greater than the 3-digit number in the "...FICO Score" field for the SAME Bureau on the BASELINE Credit Report assessment. The baseline and subsequent credit scores must be from the same bureau to count in this line. The baseline Credit Report assessment may be dated before or during the report period. (Note: Please compare each of the four possible Bureaus to find the baseline and most recent assessments. For example, if a participant has data only for TransUnion on the first ever Credit Report and only Experian data on the most recent Credit Report during the report period, the report will need to compare the first ever TransUnion data with the most recent TransUnion data during the report period, the first ever Experian data with the most recent Experian data during the report period, and same goes for each of the other 3 bureaus. If any of the bureaus shows an improvement from a lower score to a higher score or from no score due to insufficient credit history to any 3-digit score during the report period, include that person in this line. Ignore any scores on interim assessments. If an assessment has a "...FICO Score Status" field entered as "Did not attempt to pull score" or "No score available (reasons other than insufficient credit history)", ignore that data and keep looking for the baseline or most recent assessment data that shows a "...FICO Score Status" of "Got score" or "No score available (insufficient credit history)" for that Bureau.

(F23) People going from "unscored" to "scored": The unduplicated count of participants for whom the improvement was from a value of "No score available (insufficient credit history)" in a "...FICO Score Status" field to having a 3-digit number in a "...FICO Score" field in the SAME Bureau.

> **(F24) Range of Score:** Report the smallest value in "...FICO Score" and the largest value in "...FICO Score" in the subsequent Credit Report assessments.

> **(F25) Average Score:** Report the average value in "...FICO Score" in the subsequent Credit Report assessments.

> **(F26) Median Score:** Report the median value in "...FICO Score" in the subsequent Credit Report assessments.

(F27) People going from a lower score to a higher score: The unduplicated count of participants for whom the improvement was from a lower 3-digit number in a "...FICO Score" field to a higher 3-digit number in a "...FICO Score" field in the SAME Bureau.

> **(F28) Range of Increase in Score:** Report the smallest increase in FICO score and the largest increase in FICO score.

> **(F29) Average Increase in Score:** Report the average of all the increases in FICO Score.

> **(F30) Median Increase in Score:** Report the median of all the increases in FICO Score.

(F31) People with Monthly Net Income (NI) going up: The unduplicated count of participants who have a value in the "Total Monthly Net Income" field on the MOST RECENT subsequent Budget assessment with an "Assessment Date" during the report period that is GREATER THAN the value in the "Total Monthly Net Income" field on the participant's FIRST ever Budget assessment. Compare only Budget assessments with the same value in the "Budget reflects own finances/whole HH" field. If a participant has at least one record marked as "Budget reflects participant only or a household of one" and at least one marked as "Budget reflects whole household", then compare the participant's first ever Budget assessment with a given value in the "Budget reflects own finances/whole HH" field with the most recent subsequent Budget assessment with an "Assessment Date" during the report period with the same value in the "Budget reflects own finances/whole HH" field. If a participant has an increase in NI for Budget assessments with a given value in the "Budget reflects own finances/whole HH" field but not in the Budget assessments with the other value in the "Budget reflects own finances/whole HH" field, they should still be included in this line.

> **(F31a) Average Net Income (NI) Increase:** The average of the difference between the "baseline" and the most recent subsequent Budget assessment that triggered inclusion in line "People with Monthly Net Income (NI) going up".

(F32) People going from negative to "0" or positive Net Income: The unduplicated count of participants who have a value in the "Total Monthly Net Income" field that is equal to or greater than 0 on a subsequent Budget assessment with an "Assessment Date" during the report period AND who have a negative value in the "Total Monthly Net Income" field on the FIRST ever Budget assessment.

(F33) People with Net Worth (NW) going up: The unduplicated count of participants who have a value in the "Total Net Worth" field on the MOST RECENT subsequent Balance Sheet assessment dated during the report period that is GREATER THAN the value in the "Total Net Worth" field on the participant's FIRST ever Balance Sheet assessment. Compare only Balance Sheet assessments with the same value in the "Bal Sheet reflects own finances/whole HH" field. If a participant has at least one record marked as "Balance sheet reflects participant only or a household of one" and at least one marked as "Balance sheet reflects whole household", then compare the participant's first ever Balance Sheet assessment with a given value in the "Bal Sheet reflects own finances/whole HH" field with the most recent subsequent Balance Sheet assessment with an "Assessment Date" during the report period with the same value in the "Bal Sheet reflects own finances/whole HH" field. If a participant has an increase in NW for Balance Sheet assessments with a given value in the "Bal Sheet reflects own finances/whole HH" field but not in the Balance Sheet assessments with the other value in the "Bal Sheet reflects own finances/whole HH" field, they should still be included in this line.

> **(F33a) Average Net Worth (NW) Increase:** The average of the difference between the "baseline" and the most recent subsequent Balance Sheet assessment that triggered inclusion in line "People with Net Worth (NW) going up".

> **(F33b) Average assets increase:** Among the participants with an increase in net worth, the average of the following for each participant: the difference between the MOST RECENT "Total Assets" on an Assessment with a "Date" during the report period and the "Total Assets" on the participant's FIRST EVER balance sheet with a "Date" during or before the report period.

> **(F33c) Average liabilities reduction:** Among the participants with an increase in net worth, the average of the following for each participant: the difference between the MOST RECENT "Total Liabilities" on an Assessment with a "Date" during the report period and the "Total Liabilities" on the participant's FIRST EVER balance sheet with a "Date" during or before the report period.

(F34) People going from negative to "0" or positive Net Worth: The unduplicated count of participants in line F18 who have a value in the "Total Net Worth" field that is equal to or greater than 0 on a subsequent Balance Sheet assessment with an "Assessment Date" during the report period AND who have a negative value in the "Total Net Worth" field on the FIRST ever Balance Sheet assessment.

(F35) People with at least one key financial outcome: The unduplicated count of participants who had an increase in Net Income, Net Worth, and/or FICO Score during the report period.

> **(F35a) People completing at least one action plan goal:** The unduplicated count of people with at least one key financial outcome who have a date during the report period in "Actual Completion Date" and any value in "Client Goal".

(F36) People with increase in Financial Well-Being Score: The unduplicated count of participants in F9b with a higher value in the "Financial well-being score" field on their most recent subsequent Financial Health assessment with an "Assessment Date" during the report period than on the participant's baseline Financial Health assessment.

> **(F37) Average increase in Financial Well-Being Score:** Report the average of all the increases in Financial well-being score.

(F38) Median increase in Financial Well-Being Score: Report the median of all the increases in Financial well-being score.

(F39) Total # of people who increased short term savings: The unduplicated count of people who have a TOTAL value in the following three fields: 1) "Checking Account(s)", 2) "Savings Account(s)", and 3) "Cash" on the MOST RECENT subsequent Balance Sheet assessment with an "Assessment Date" during the report period that is GREATER THAN the TOTAL value in the following three fields: 1) "Checking Account(s)", 2) "Savings Account(s)",and 3) "Cash" on the participant's FIRST ever Balance Sheet assessment. Compare only Balance Sheet assessments with the same value in the "Bal Sheet reflects own finances/whole HH" field. If a participant has at least one record marked as "Balance sheet reflects participant only or a household of one" and at least one marked as "Balance sheet reflects whole household", then compare the participant's first ever Balance Sheet assessment with a given value in the "Bal Sheet reflects own finances/whole HH" field with the most recent subsequent Balance Sheet assessment with an "Assessment Date" during the report period with the same value in the "Bal Sheet reflects own finances/whole HH" field.

> **(F40) Average savings:** The average of the following for each participant: Checking Account(s), Savings Account(s), and Cash on the most recent subsequent Balance Sheet assessment that triggered inclusion in line F39.

> **(F41) Median savings:** The median of the following for each participant: Checking Account(s), Savings Account(s), and Cash on the most recent subsequent Balance Sheet assessment that triggered inclusion in line F39.

(F42) Total # of people who increased long term savings: The unduplicated count of people who have a TOTAL value in the following three fields: 1) "IRA/Retirement Accounts", 2) "Stocks, Bonds, Mutual Funds, and Similar", and 3) "College Savings Account" on the MOST RECENT subsequent Balance Sheet assessment with an "Assessment Date" during the report period that is GREATER THAN the TOTAL value in the three fields: 1) "IRA/Retirement Accounts", 2) "Stocks, Bonds, Mutual Funds, and Similar", and 3) "College Savings Account" on the participant's FIRST ever Balance Sheet assessment. Compare only Balance Sheet assessments with the same value in the "Bal Sheet reflects own finances/whole HH" field. If a participant has at least one record marked as "Balance sheet reflects participant only or a household of one" and at least one marked as "Balance sheet reflects whole household", then compare the participant's first ever Balance Sheet assessment with a given value in the "Bal Sheet reflects own finances/whole HH" field with the most recent subsequent Balance Sheet assessment with an "Assessment Date" during the report period with the same value in the "Bal Sheet reflects own finances/whole HH" field.

> **(F43) Average savings:** The average of the following for each participant: IRA/Retirement Accounts, Stocks, Bonds, Mutual Funds, and Similar, and College Savings Account on the most recent subsequent Balance Sheet assessment that triggered inclusion in line F42.

> **(F44) Median savings:** The median of the following for each participant: IRA/Retirement Accounts, Stocks, Bonds, Mutual Funds, and Similar, and College Savings Account on the most recent subsequent Balance Sheet assessment that triggered inclusion in line F42.

(F45) Total # of people who reduced non-asset related debt (includes credit card debt): The unduplicated count of people who have a TOTAL value in the following three fields: 1) "Total Credit Cards/Other Loan Balances", 2) "Total Unpaid Bills (not in collections)", 3) "Total Collections/Charge-Offs/Judgments" on the MOST RECENT subsequent Balance Sheet assessment with an "Assessment Date" during the report period that is LESSER THAN the TOTAL value in the three fields: 1) "Total Credit Cards/Other Loan Balances", 2) "Total Unpaid Bills (not in collections)", 3) "Total Collections/Charge-Offs/Judgments" on the participant's FIRST ever Balance Sheet assessment. Compare only Balance Sheet assessments with the same value in the "Bal Sheet reflects own finances/whole HH" field. If a participant has at least one record marked as "Balance sheet reflects participant only or a household of one" and at least one marked as "Balance sheet reflects whole household", then compare the participant's first ever Balance Sheet assessment with a given value in the "Bal Sheet reflects own finances/whole HH" field with the most recent subsequent Balance Sheet assessment with an "Assessment Date" during the report period with the same value in the "Bal Sheet reflects own finances/whole HH" field. Student Loan(s) (total balance) debt" are not be included in the "Total Credit Cards/Other Loan Balances. Excludes student loans.

> **(F45a) Average non-asset debt reduction amount:** Among the participants who reduced non-asset related debt, the average of the following for each participant: The difference between the baseline TOTAL amount of: 1) "Total Credit Cards/Other Loan Balances", 2) "Total Unpaid Bills (not in collections)", 3) "Total Collections/Charge-Offs/Judgments") and the TOTAL amount of: 1) "Total Credit Cards/Other Loan Balances", 2) "Total Unpaid Bills (not in collections)", 3) "Total Collections/Charge-Offs/Judgments") on the most recent balance sheet. Excludes student loans

> **(F45b) # of clients who reduced <u>non-asset</u> liabilities by at least $1,000:** Among the participants who reduced non-asset related debt, the unduplicated count of people who have a TOTAL amount in (1) "Total Credit Cards/Other Loan Balances", 2) "Total Unpaid Bills (not in collections)", 3) "Total Collections/Charge-Offs/Judgments") on the MOST RECENT subsequent Balance Sheet assessment with an "Assessment Date" during the report period that is LESSER THAN the TOTAL amount in (1) "Total Credit Cards/Other Loan Balances", 2) "Total Unpaid Bills (not in collections)", 3) "Total Collections/Charge-Offs/Judgments") FIRST ever Bal Sheet assessment. Compare only Balance Sheet assessments with the same value in the "Bal Sheet reflects own finances/whole HH" field. If a participant has at least one record marked as "Balance sheet reflects participant only or a household of one" and at least one marked as "Balance sheet reflects whole household", then compare the participant's first ever Balance Sheet assessment with a given value in the "Bal Sheet reflects own finances/whole HH" field with the most recent subsequent Balance Sheet assessment with an "Assessment Date" during the report period with the same value in the "Bal Sheet reflects own finances/whole HH" field. Excludes student loans.

(F46) Total # of people who increase savings: The unduplicated count of people who have a TOTAL value in any the following six fields: 1) "Checking Account(s)", 2) "Savings Account(s)", and 3) "Cash" 4) "IRA/Retirement Accounts", 5) "Stocks, Bonds, Mutual Funds, and Similar", and 6) "College Savings Account" on the MOST RECENT subsequent Balance Sheet assessment with an "Assessment Date" during the report period that is GREATER THAN the TOTAL value in any of the following six fields: 1) "Checking Account(s)", 2) "Savings Account(s)",and 3) "Cash" on the participant's FIRST ever Balance Sheet assessment. Compare only Balance Sheet assessments with the same value in the "Bal Sheet reflects own finances/whole HH" field. If a participant has at

least one record marked as "Balance sheet reflects participant only or a household of one" and at least one marked as "Balance sheet reflects whole household", then compare the participant's first ever Balance Sheet assessment with a given value in the "Bal Sheet reflects own finances/whole HH" field with the most recent subsequent Balance Sheet assessment with an "Assessment Date" during the report period with the same value in the "Bal Sheet reflects own finances/whole HH" field.

(F46a) Number of people who increase savings by 25% or higher: Among the participants who increased savings, the number of clients who's total difference is EQUAL OR GREATER than 25%.

(F46b) Number of people who increase savings by $1,500 or more: Among the participants who increased savings, the number of clients who's total difference was EQUAL OR GREATER than $1,500.

(F46c) Number of people who establish savings: Among the participants who increased savings, the number of clients who's baseline savings is $0 and during the most recent assessment there is a savings amount present.

(F47) Number of people who acquired a bank account: The unduplicated count of participants who have at least one Financial Counseling Service Entry with a "Date" during the report period with any of the following topics; 1) Checking Account, or 2) Savings Account AND an "Opened" value for "Status".

(F48) # of people who acquired a financial asset (home, credit card, savings account, retirement savings, Twin Accounts and/or other products): The unduplicated count of participants who have at least one Financial Counseling Service Entry with a "Date" during the report period with any of the following topics; 1) Home Loan (purchase/refinancing), 2) Credit Card (includes store cards), 3) Savings Account, 4) Retirement Account, 5) Credit Builder Loan (with match), and 6) Credit Builder Loan (without match) AND an "Opened" or "Approved (or re-approved)" value as the "Status".

(F48a) # of people who acquired a home loan (purchase/refinancing): The unduplicated count of participants who have at least one Financial Counseling Service Entry with a "Date" during the report period with Home Loan (purchase/refinancing) as the service domain AND "Approved (or re-approved)" value as the "Status".

(F48b) # of people who acquired a credit card (includes store cards): The unduplicated count of participants who have at least one Financial Counseling Service Entry with a "Date" during the report period with credit card (includes store cards) as the service domain AND an "Opened" value as the "Status".

(F48c) # of people who acquired a savings account: The unduplicated count of participants who have at least one Financial Counseling Service Entry with a "Date" during the report period with savings account as the service domain AND an "Opened" value as the "Status".

(F48d) # of people who acquired a retirement account: The unduplicated count of participants who have at least one Financial Counseling Service Entry with a "Date" during the report period with retirement account as the service domain AND an "Opened" value as the "Status".

(F48e) # of people who acquired a credit builder loan (with match): The unduplicated count of participants who have at least one Financial Counseling Service Entry with a "Date" during the report period with credit builder loan (with match) as the service domain AND an "Opened" or "Approved (or re-approved)" value as the "Status".

(F48f) # of people who acquired a credit builder loan (without match): The unduplicated count of participants who have at least one Financial Counseling Service Entry with a "Date" during the report period with credit builder loan (without match) as the service domain AND an "Opened" or "Approved (or re-approved)" value as the "Status".

(F49) # of people who have expressed an intent to save: The unduplicated count of people with at least one ECM Goal with a "Create Date" during the report period with "Savings/Investing" as the client goal.

(F50) # of people who completed a savings goal: The unduplicated count of people with at least one ECM Goal with a "Completed Date" during the report period with "Savings/Investing" as the client goal..

(F50a) # of goals: The record count of ECM Goal with a "Completed Date" during the report period with "Savings/Investing" as the client goal.

(F51) # of people who complete a baseline housing assessment: The unduplicated count of clients who have a "Housing Assessment" with a "Date" during the report period and a sequence value of "Baseline".

(F52) # of people working towards homeownership: The unduplicated count of clients who have a "Financial Counseling Service Entry" with a "Date" during the report period for the "Home Loan (purchase/refinancing)" topic AND any of the following status values; 1) Discussed pros/cons, 2) Referred to provider(s), and 3) Applied (or re-applied).

Digital Literacy

(D1) People who got a digital literacy service for the first time: The unduplicated count of participants in who NEVER had any of the following before the report period:

- a Workshop/Class group direct service with a "Date" before the report period, "Digital Literacy Workshop" selected in the "Type of Workshop/Class" field, OR any of the following: Financial Workshop, Employment/Education Workshop, Income Supports Workshop, Vocational Training Class, or Other, selected in the "Type of Workshop/Class" field with the "Curriculum contains digital literacy" box checked, AND "Attended" selected in the "Client Attendance" field, OR

- an Employment Counseling, Income Supports Counseling and/or Financial Coaching

(Lightning) service entry a "date" before the report period AND "yes" in the "Digital Skills Training/Navigation" field OR

- a Digital Navigation Service entry OR
- an education record with "Contextualized Digital Skilling" box check OR
- "Digital Navigation" assessment

(D2) People who got at least one digital literacy service: The unduplicated count of participants who have at least one of the following during the report period:

- Workshop/Class group service entry with a "Date" during the report period, "Digital Literacy Workshop" selected in the "Type of Workshop/Class" field, and/or any of the following: Financial Workshop, Employment/Education Workshop, Income Supports Workshop, Vocational Training Class, or Other, selected in the "Type of Workshop/Class" field with the "Curriculum contains digital literacy" box checked, and "Attended" selected in the "Client Attendance" field OR
- an Employment Counseling, Income Supports Counseling and/or Financial Coaching (lightning) service entry with a "date" during the report period AND "yes" for "Digital Skills Training/Navigation" field OR
- a Digital Navigation Service entry with a "date" during the report period OR
- an education record with "Contextualized Digital Skilling" box check and a "start date" during the report period OR
- "Digital Navigation" assessment with an "assessment date" during the report period.

(D3) People who had at least one direct counseling contact that included digital literacy coaching: The unduplicated count of participants who have at least one Employment Counseling, Income Supports Counseling, Financial Coaching (Lightning) and/or Digital Navigation service entry with a "date" during the report period, "yes" for "Digital Skills Training/Navigation" field (this one does not apply to Digital Navigation), "Yes" in the "Reach person you attempted to contact?" field, and "Client" in the "Contact with" field.

(D4) Number of digital literacy workshops delivered: The unduplicated count of Financial Workshop, Employment/Education Workshop, Income Supports Workshop, Vocational Training Class, and/or Other, selected in the "Type of Workshop/Class" field with the "Curriculum contains digital literacy" box checked, and/or Digital literacy workshop selected in the "Type of Workshop/Class" field, AND a workshop "status" of "Recorded Attendance" and a "Date/Time" during the report period.

(D5) People who received at least one digital literacy service AND who ever received an Employment Counseling service: The unduplicated count of participants in D2 who also have at least one of the following before or during the report period: a "Date" on an Employment Counseling service entry; a "Start date" or "End date" on an Education/Training Program record; a "Date" on an Education/Training Program record Education Progress; a "Job Start Date" or "Job End Date" on an Employment Record; a "Date" on an Employment Record Advancement; a "Date degree/certificate/license obtained" on a Degree/Certificate/License record; a "Referral Date" on

an Outbound Referral with any of the following selected in the "Referral Reason(s)" field: "Education/training", "Employment services", "Job interview", "License/certification"; a "Date" on a Work/Education Supports service.

(D6) People subsequently placed in an unsubsidized job: The unduplicated count of participants who have ever had digital literacy service and an Employment Record with all of the following: (1) a "Job Start Date" on or after the "Date" of the participant's first digital literacy service, (2) a "Job Start Date" during the report period, (3) "Unsubsidized Job" in the "Wage Type" field; and (4) no check mark in the "Client had this job before enrollment" field.

(D7) People subsequently achieving promotion and/or wage increases: The unduplicated count of Advancements for participants who have ever had digital literacy service and have all of the following: (1) a "Date of change in employment" during the report period; (2) a value of "Increase in hours", "Increase in wages", and/or "Obtained promotion" in the "Status" field.

(D8) People showing a digital skills gains: The unduplicated count of participants in D2 who have a "Date" during the report period in an Employment Counseling OR Digital Navigation service entry with an "Exam" topic, a value of "Yes" in "Reach the person you attempted to contact", a "status" of "Passed exam", and "type of exam" is "Digital Literacy".

(D9) People accessing devices: The unduplicated count of people who accessed the resource room service area with a "date" during the report period and "Computers/Internet" selected in "Resource Room Activities" OR a Work/Education Supports service area with a "date" during the report period and "Received Lending Library Technology" as the Work/education support type OR Digital Navigation service entry with a "date" during the report period and any value in the "Obtained a Device" topic

Workshops / Classes

(W1) People who attended Employment/Education Workshop for the first time: The unduplicated count of those in line W2 who attended at least one workshop in Employment/Education for the first time ever.

(W2) People who attended at least one Employment/Education Workshop: The unduplicated count of people who attended at least one workshop in Employment/Education during the report period. This is tracked by checking "Attended" on the "Client Attendance" in the Groups/Classes. If a participant attended more than one workshop, s/he will be counted once in this unduplicated count.

(W3) People who attended Financial Workshop for the first time: The unduplicated count of those in line W4 who attended at least one workshop in Financial for the first time ever.

(W4) People who attended at least one Financial Workshop: The unduplicated count of people who attended at least one workshop in Financial during the report period. This is tracked by checking "Attended" on the "Client Attendance" in the Groups/Classes. If a participant attended more than one workshop, s/he will be counted once in this unduplicated count.

(W5) People who attended Income Supports Workshop for the first time: The unduplicated count of those in line W6 who attended at least one workshop in Income Supports for the first time ever.

(W6) People who attended at least one Income Supports Workshop: The unduplicated count of people who attended at least one workshop in Income Supports during the report period. This is tracked by checking "Attended" on the "Client Attendance" in the Groups/Classes. If a participant attended more than one workshop, s/he will be counted once in this unduplicated count.

(W7) People who attended Vocational Training for the first time: The unduplicated count of those in line W8 who attended at least one class in Vocational Training for the first time ever.

(W8) People who attended at least one Vocational Training Class: The unduplicated count of people who attended at least one class in Vocational Training during the report period. This is tracked by checking "Attended" on the "Client Attendance" in the Groups/Classes. If a participant attended more than one workshop, s/he will be counted once in this unduplicated count.

(W9) People who attended a Digital Literacy Workshop or a workshop that includes digital literacy for the first time: The unduplicated count of those in line W10 who attended a workshop for the first time ever.

(W10) People who attended at least one Digital literacy Workshop or a workshop that includes digital literacy: The unduplicated count of participants who have at least one Workshop/Class group service entry with a "Date" during the report period, "Digital Literacy Workshop" selected in the "Type of Workshop/Class" field, and/or any of the following: Financial Workshop, Employment/Education Workshop, Income Supports Workshop, Vocational Training Class, or Other, selected in the "Type of Workshop/Class" field with the "Curriculum contains digital literacy" box checked, and "Attended" selected on the "Client Attendance" field.

(W11) Total # of people who attended at least one FFT Workshop/Class: The unduplicated count of people who attended at least one workshop in Employment/Education, Financial and Income Supports during the report period. This is tracked by checking "Attended" on the "Client Attendance" in the Groups/Classes. If a participant attended more than one workshop, s/he will be counted once in this unduplicated count.

Overall Participation in FFT Services (Tax Prep not included)

(O1) People who had at least one direct counseling contact: The unduplicated count of participants who have at least one Employment, Income Supports, and/or Financial Counseling Service Entry with a "Date" during the report period, "Yes" in the "Reach person you attempted to contact?" field, and "Client" in the "Contact with" field.

(O2-O4)Frequency of Counseling Contact (since enrollment, among people with at least one direct counseling contact during the report period):

- **1 time only:** The count of participants with exactly one Employment, Income Supports, or Financial Counseling Service Entry with "Yes" in the "Reach person you attempted to contact?" field, "Client" in the "Contact with" field, and a "Date" that is on or after the "Enrolled Date" on the participant's Case Record and on or before the end date of the report period.

- **2-4 times exactly:** The count of participants with EXACTLY two, three, or four Employment, Income Supports, and/or Financial Counseling Service Entries with "Yes" in the "Reach person you attempted to contact?" field, "Client" in the "Contact with" field, and a "Date" that is on or after the "Enrolled Date" on the participant's Case Record and on or before the end date of the report period.

- **5 or more times:** The count of participants with five or more Employment, Income Supports, and/or Financial Counseling Service Entries with "Yes" in the "Reach person you attempted to contact?" field, "Client" in the "Contact with" field, and a "Date" that is on or after the "Enrolled Date" on the participant's Case Record and on or before the end date of the report period.

(O5) People who got an FFT Service for the first time (Counseling or Workshops): The unduplicated count of participants who have NEVER had any of the following services before the report period: Employment Counseling, Income Supports Counseling, and/or Financial Counseling and/or who have at least one of the following during the report period: a "Referral Date" on any Outbound Referral; a "Date" on a Workshop/Class Service with a value of "Attended" in the "Client Attendance" field on a Case Record.

(O6) People who got at least one FFT Service (Counseling or Workshops): The unduplicated count of participants who received the following services: Employment Counseling, Income Supports Counseling, and/or Financial Counseling and/or who have at least one of the following during the report period: a "Referral Date" on any Outbound Referral; a "Date" on a Workshop/Class Service with a value of "Attended" in the "Client Attendance" field on a Case Record.

(O7) People w/ Counseling or Workshop service in report period AND Counseling since enrollment: The unduplicated count of participants who got at least one FFT Service minus any participants who have only ever had Workshop/Class Service(s).

Bundling 2 (for people in the line above)

(O8) Total # of people who got exactly 1/3 FFT services: The unduplicated count of participants who have had service in EXACTLY ONE service area (Employment, Income Supports, OR Financial) since enrollment in the Financial Opportunity Center, meaning they fall into EXACTLY ONE of the following categories: (1) EC/EW: they are included in line E2 and/or have a Workshop/Class service with "Employment/Education Workshop" or "Vocational Training Class" selected in the "Type of Workshop/Class" field, with "Attended" selected in "Client Attendance" and dated during the report period AND they have NEVER had a service that would trigger their inclusion in line I2 or line F2 nor a Workshop/Class Service with "Income Supports

Workshop" or "Financial Workshop" selected in the "Type of Workshop/Class" field and "Attended" selected in "Client Attendance"; (2) IC/IW: they are included in line I2 and/or have a Workshop/Class Group service entry with "Income Supports Workshop" selected in the "Type of Workshop/Class" field, with "Attended" selected in "Client Attendance" and dated during the report period AND they have NEVER had a service that would trigger their inclusion in line E2 or line F2 nor a Workshop/Class Service with "Employment/Education Workshop", "Vocational Training Class", or "Financial Workshop" selected in the "Type of Workshop/Class" field and "Attended" selected in "Client Attendance"; OR (3) FC/FW: they are included in line F2 and/or have a Workshop/Class service with "Financial Workshop" selected in the "Type of Workshop/Class" field, with "Attended" selected in "Client Attendance" and dated during the report period AND they have NEVER had a service that would trigger their inclusion in line E2 or line I2 nor a Workshop/Class Group Service Entry with "Employment/Education Workshop", "Vocational Training Class", or "Income Supports Workshop" selected in the "Type of Workshop/Class" field and "Attended" selected in "Client Attendance".

> **(O9) Total % of people who got exactly 1/3 FFT services:** The number of people who got exactly 1/3 FFT services divided by the number of people w/ counseling or workshop service in report period AND counseling since enrollment.

(O10) Total # of people who got exactly 2/3 FFT services: The unduplicated count of participants who have TWO of the following: (A) at least one service that triggers inclusion in line E2, I2, or F2 AND/OR a Workshop/Class Group Service with a value in the "Type of Workshop/Class" field that is NOT "Digital Literacy Workshop" or "Other" during the report period; AND (B) service in EXACTLY TWO service areas (Employment, Income Supports, Financial) since enrollment in the Financial Opportunity Center, meaning they fall into EXACTLY TWO of the following categories: (1) EC/EW: they have ever had a service that triggers inclusion in line E2 and/or have had a Workshop/Class Group service entry with "Employment/Education Workshop" or "Vocational Training Class" selected in the "Type of Workshop/Class" field; (2) IC/IW: they have ever had a service that triggers inclusion in line I2 and/or have had a Workshop/Class Group service entry with "Income Supports Workshop" selected in the "Type of Workshop/Class" field; (3) FC/FW: they have ever had a service that triggers inclusion in line F2 and/or have had a Workshop/Class Group service entry with "Financial Workshop" selected in the "Type of Workshop/Class" field.

> **(O11) Total % of people who got exactly 2/3 FFT services**: The number of people who got exactly 2/3 FFT services divided the number of people w/ counseling or workshop service in report period AND counseling since enrollment.

(O12) Total # of people who got exactly 3/3 FFT services: The unduplicated count of participants who have BOTH of the following: (A) at least one service that triggers inclusion in line E2, I2, or F2 AND/OR a Workshop/Class Group Service with a value in the "Type of Workshop/Class" field that is NOT "Digital Literacy Workshop" or "Other" during the report period; AND (B) service in ALL THREE service areas (Employment, Income Supports, Financial) since enrollment in the Financial Opportunity Center, meaning they fall into ALL THREE of the following categories: (1) EC/EW: they have ever had a service that triggers inclusion in line E2 and/or have had a Workshop/Class Group service entry with "Employment/Education Workshop" or "Vocational Training Class" selected in the "Type of Workshop/Class" field; (2) IC/IW: they have ever had a service that triggers inclusion in line I2 and/or have had a Workshop/Class Group service entry with "Income Supports Workshop" selected in the "Type of Workshop/Class" field; AND (3) FC/FW: they have ever had a service

that triggers inclusion in line F2 and/or have had a Workshop/Class Group service entry with "Financial Workshop" selected in the "Type of Workshop/Class" field.

(O13) Total % of people who got exactly 3/3 FFT services: The number of people who got exactly 3/3 FFT services divided by the number of people w/ counseling or workshop service in report period AND counseling since enrollment.

Bundling 2 Totals for 2/3 & 3/3

(014) Total # of people receiving 2/3 and 3/3 FFT services: The unduplicated count of participants who got 2/3 FFT services (O10) and participants who got 3/3 FFT services (O12).

(015) Bundling Rate: The number of people receiving 2/3 and 3/3 FFT services (O14) divided by People w/ Counseling or Workshop service in report period AND Counseling since enrollment**.**

(O16) Total # of active Case Records: The unduplicated count of people who have an active case record (not closed) on the last day of the report period. It does not matter whether a participant got a service during this time period; nor does the participant's enrollment date matter.

Impact of Bundling on Key Outcomes (2/3 & 3/3)

(O17) Net Income going up: The unduplicated count of people in both "Total # of people who got exactly 2/3 and 3/3 FFT services" and "Total # people with Net Income (NI) going up."

(O18) Net Worth going up: The unduplicated count of people in both "Total # of people who got exactly 2/3 and 3/3 FFT services" and "Total # people with Net Worth (NW) going up."

(O19) FICO Credit Score going up: The unduplicated count of people in both "Total # of people who got exactly 2/3 and 3/3 FFT services" and "Total # people with at least one credit bureau showing an improved credit score."

(O20) Placed in jobs (all types): The unduplicated count of people in both "Total # of people who got exactly 2/3 and 3/3 FFT services" and "People placed in jobs (all types)."

(O21) Achieved 90-day steady retention: The unduplicated count of people in both "Total # of people who got exactly 2/3 and 3/3 FFT services" and "Achieved 90-day steady employment during the report period (verified)"

(O22) Achieved 180-day steady retention: The unduplicated count of people in both "Total # of people who got exactly 2/3 and 3/3 FFT services" and "Achieved 180-day steady employment during the report period (verified)"

(O23) Achieved 365-day steady retention: The unduplicated count of people in both "Total # of people who got exactly 2/3 and 3/3 FFT services" and "Achieved 365-day steady employment during the report period (verified)"

(O24) Total # of people with at least one Key Outcome: The unduplicated count of people in O17 thru O23.

Demographics

These lines report the unduplicated demographics count of people from line "People w/ Counseling or Workshop service in report period AND Counseling since enrollment" during the report period.

- **Age:** These lines calculate age as of the end date of the report based on the "Birthdate".

- **Highest Grade Completed:** These lines calculate the highest grade completed value as of the end date of the report.

- **Criminal Convictions:** These lines calculate the criminal convictions value as of the end date of the report.

Table 1:

Group(s) for reporting values:

Accelerated Training Program	Pilot 1
Accenture LX	Pilot 2
Adult Learning Lab	Pre-Paid Expense Card
Apprentice Program	Pre-Paid Income Card
Apprenticeship Readiness	PropserUS
BuildingA	Retail Pilot
BuildingB	Retention Initiative
BuildingC	Siemer
CDBG	SiteA
Citi Bridges	SiteB
Community Programs	SiteC
CountyA	SiteD
CountyB	SiteE
CountyC	SiteF
CountyD	SiteG
Covid-19	SiteH
Credit Building	SiteI
Credit Building Product Completers	SiteJ
Digital Literacy	SiteK
Disaster Recovery	SiteL
DOL: Reentry	SiteM
Due for Credit Report Pull	Subsidized bike sharing program
Early Childhood Education	Supportive Services for Veterans and Families (SSVF)
Earn & Learn (E&L)	TANF
Ecredable	Twin Account Payment
Emergency Rental Assistance Funds	Union Pacific
Entrepreneurship/Microenterprise	Vocational Rehabilitation – ES
ETFC	Vocational Rehabilitation – SE
Family Self-Sufficiency	WIOA 1A
Food Bank Scholarship	WIOA 1D
Homelessness Continuum of Care	Worker Retraining
Homeless Veterans Reintegration Program (HVRP)	Workfirst
Homeownership Assistance Team (HAT)	Workforce Benchmarking Survey Group A
Housing Services	Workforce Benchmarking Survey Group B
Industry Specific Training	Workforce Connector
Justice Involved	Workplace Coaching Group A
PATH	Workplace Coaching Group B
Pfizer Rx Pathways	Workplace Coaching Group C