

**United Way of Wayne and Holmes County
Business Plan**

LIVE UNITED



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I. THE EXECUTIVE SUMMARY

United Way of Wayne and Holmes Counties (UW) is a foundation focused on moving 10,000 individuals out of poverty by aligning social systems and supporting the social sector through funding programs aimed at poverty alleviation. UW wanted to first understand what the true indicators of multidimensional poverty in Wayne and Holmes Counties were, and then to be able to use those measures to serve as a guideline to make decisions about program funding for their local nonprofit partners. However, our research found that providing indicators to evaluate programs was a task that needed more time and careful consideration than we as a team of four could provide over the course of the semester. Therefore, the scope of the project was modified to research and recommend informational indicators of poverty, that is, indicators that show a true, multidimensional view of the current picture of poverty in the community. Through creating these measures of poverty, we provided a lens and theoretical support to the concept of multidimensional poverty.

Through our extensive research on poverty, we have adopted a lens of poverty conceptualized by Amartya Sen (1999) which operationalizes poverty as a deprivation of capabilities. The three categories that the Wayne County community voiced as the main issues of poverty were education, income, and health. Other organizations have used similar categories that are also supported by Sen's theory of poverty. Upon further research, we discovered it was vital to articulate social inclusion as an integral category to decreasing poverty in this community. Thus, we additionally recommend a fourth category, one that details social inclusion as a critical factor of poverty in the United States and specifically in Wayne and Holmes Counties. Within these four categories (education, income, health, and social inclusion) we defined informational indicators that were supported by research both from the community and from scholarly studies of poverty (See Table 3 and Table 5).

Furthermore, we understand that UW chooses to operate through the process of Results-Based Accountability (RBA). The RBA model is a different actionable approach and way of thinking designed to improve lives and communities. Unlike other logic models, RBA starts with the ends and works backward towards the means in a step-by-step process. Through this RBA approach, we have developed an alternative strategy in which to view poverty, developed informational indicators of poverty, and suggested further recommendations for evaluating efforts. Lives will only be measurably improved if there is continual community involvement

and conversation. Yearly and systematic data retrieval is absolutely necessary in order to recognize the greatest needs of individuals and the community to prevent poverty. The RBA model will be complete after the continual data collection and consulting efforts have defined evaluative indicators of poverty to measure the success of specific programs. This process is working to reach the ends, the Bold Goal of 10,000 people out of poverty by 2025.

Our project developed the informational indicators of poverty and as previously mentioned, the next step is for UW to develop evaluative indicators in order to track the success and set measures for the programs they choose to fund. Therefore, we recommend two evaluative processes that UW can pursue: conventional evaluation consulting and the Participatory Monitoring & Evaluation approach. Conventional evaluating is costly and mainly involves the knowledge of one outside evaluator. The PM&E approach involves many community stakeholders as well as integrates and builds upon local knowledge to develop measures of success. The PM&E improves local nonprofit partners' skills in evaluation and creates ownership over the process as they define and track their own success. However, the PM&E also requires a significant amount of time from UW as a facilitator organization and comes with the time and energy costs of coordinating multiple stakeholders. The PM&E approach also fits well with UW's mission in mobilizing community resources and serving as an overseer and leader in the community's approach to poverty.

From our work, we provide four recommendations for the UW moving forward towards its Bold Goal:

- 1. To include “Social Inclusion” as a future focus group, as it is an important indicator of relative poverty felt by an individual within a community**
- 2. To continue yearly community data collection to understand deprivations of capabilities within the community**
- 3. To engage with a large community of stakeholders and inspire collaboration amongst a diverse set of partners**
- 4. To pursue a Participatory Monitoring and Evaluation (PM&E) approach in future steps to create measures to evaluate the effectiveness of programs in poverty alleviation under a multidimensional lens.**

Lastly, we consider the possible risks UW could face during this transitions. Changing to an issue-focused model could be beneficial but also disadvantageous. Poverty is multidimensional in nature, therefore, focusing on the issues of education, health, income, and social inclusion alone could leave out individuals in poverty that do not fall into these categories. Also, such a switch will increase expenditure costs. Noting that UW is a nonprofit organization, there is a risk that costs will rise faster than revenues creating a net loss, which could ultimately impact the way UW operates. Other risks associated with this switch is that the suggested measure does not accurately describe conditions of poverty in Wayne and Holmes Counties. Ultimately, UW has to figure ways to mitigate or transfer these risks to avoid losses and achieve the goal of the mission.

II. BUSINESS SUMMARY

A. Mission

United Way of Wayne and Holmes Counties is a fundraising organization that serves as a catalyst to strengthen the community by coordinating and financially supporting social programs throughout the two northeastern Ohio counties. This organization's mission is to be a positive impact on the community by *mobilizing community resources to help people measurably improve their lives*. The past model of UW was mainly focused on meeting a fundraising goal and then providing resources to community partners and programs. United Way recently switched over to an issue-focused group that is focused on preventing the main issue in Wayne and Holmes County: poverty. The problem with the past model of UW was that much of the community did not know what their donations to United Way were going towards. Therefore, UW decided to switch to an issue-focused model where their success was determined not by how many hundreds of dollars they raised, but by how many people they moved out of poverty through the programs they funded. UW is currently in the process of switching to this model. Through community research, interviews, and assessments, United Way has identified an objective to move this community forward. This objective, referred to as the Bold Goal, is to have 10,000 people out of poverty by the year 2025.

B. Business Model

Core Mission

United Way organizes and collaborates with many donors and agency partners to strengthen the communities within Wayne and Holmes Counties. By coordinating educational programs, UW is increasing school readiness and preparing the futures of children. UW is providing financial stability and community health services by ensuring residents have access to the appropriate resources. Furthermore, UW has quickly responded to emergency situations by making sure families have food, shelter, and clothing. Although UW has impacted some lives through certain programs, UW wishes to change the lens in which poverty is currently viewed. UW seeks to alter this lens so that it addresses poverty in a multidimensional analysis, that will truly articulate the needs of the people of within the community.

Strategic Resources

Due to the strong community-oriented mission of United Way, several strategic resources have been attained. First, United Way has mastered fundraising skills that they utilize to fund a large portion of their non-profit. In 2013, they raised \$134,975 from fundraisers alone (Annual Report, 2014). UW also uses what are called “FUN-raising” opportunities to further community participation. These events attempt to align family participation, money raised, and fun into one. Examples include the 2nd Annual Kickin' It For Kids Kickball Tournament and the 2016 Buehler's Heart and Sole Community Walk & Run.

Second, UW has a keen eye and a great ability to view the needs of the community. UW recognized the changes that needed to take place in order for there to be less poverty. To address the issue of poverty, UW carried out community assessments that asked the people within the community specifically about the barriers of getting out of poverty and the contributing factors of poverty. Out of these responses, the needs of the people within the community can be acknowledged. UW can now incorporate these responses into funding programs that address these needs stated directly by the community. UW's ability to recognize this process is critical in attacking the root of the problems.

Finally, UW is supported by both a professional staff and unpaid community volunteers. The staff includes personnel such as the executive director. The volunteers could be members of focus councils, members of the board of trustees, or an individual who participates in a

fundraising event. By having both paid and unpaid workers, UW can affirm that people within the community are wanting to participate in this change for the better. Without this support system, the collective community outreach would not be successful.

Partnership Network

United Way has a strong partnership network throughout Wayne and Holmes Counties. These partners include private donors who donate funds toward achieving United Way's mission; volunteers who donate their time and energy to execute community projects and initiatives; and agency partners or organizations that use UW funding to carry out their services for the betterment of the community. There are over 220 donors who give various amounts of financial support to help UW coordinate their services (Annual Report, 2014).

According to the 2014 Community Results, United Way invested \$911,422 into education, family and financial stability, health, and core emergency programs. These funds were distributed to 19 organizations and community partners to support their services in Wayne County. To address educational initiatives, \$269,258 went to the following community partners:

- Learn N' Play
- Wee Care Child Care Center
- Orrville Area Boys and Girls Club
- Salvation Army of Wooster
- YMCA of Wooster
- Wooster City Schools Out-of-School Program
- Liberty Center Connections

To ensure family and financial stability, a total of \$114,365 was given to the following community partners:

- ABLE
- Catholic Charities
- The Counseling Center
- Greenleaf Family Center & Services for the Deaf
- Every Woman's House Housing Initiative

Health services were supported with \$238,073 that went to the following community partners:

- NAMI of Wayne and Holmes

- Viola Startzman Clinic
- Planned Parenthood of NE Ohio
- STEPS at Liberty Center

To respond to core emergencies, a total of \$289,726 was given to the following community partners:

- Community Legal Aid
- Salvation Army of Wooster
- Liberty Center Connections
- People to People Ministries

These agency partners are working to prevent poverty in some capacity. Through their partnerships and needed programs, UW can work toward reaching the Bold Goal.

Service Interface

UW acts as a leader and role model for moving the community forward as part of a larger collective impact. UW seeks to be the backbone of initiatives that end poverty in Wayne and Holmes Counties. By orchestrating programs and community partners together into one collective impact, UW is acting as a catalyst of change. The various partnerships with community organizations, donors, and numerous volunteers combined with fundraising opportunities allow UW to interact with the community in multiple ways. These affiliated programs and events are advertised through online websites and publications, newspaper articles, and signs throughout the county. For example, to advertise the Bold Goal, large campaign signs have been installed at various locations, several of which are on college campuses including The College of Wooster and The Ohio State University Agricultural Technical Institute. These advertising attempts are implemented to build awareness of what United Way is trying to do because of the need for the whole community to be supportive of these new initiatives.

C. SWOT Analysis



We conducted a SWOT analysis to better inform the understanding of United Way as an organization as well as the implementation of the collective impact approach which will be used in order to track 10,000 people out of poverty by 2025. One internal strength is that UW is a champion community organizer and fundraiser. A strength relevant to the project is that there is a large market of nonprofits already working with and addressing poverty in Wayne and Holmes County. The implementation of a new lens of poverty and a new process of funding demonstrates a weakness in that it takes considerable time and labor efforts from staff members both within United Way and those working in its partner organizations. Secondly, this new approach may lead UW to give less funding to certain programs that cannot track the outcome measures that fit within their lens of poverty.

Externally, the opportunity is that this approach may lend a tangible way to track UW's bold goal to get 10,000 out of poverty by 2025. By defining what is poverty in Wayne and Holmes County, the first step is laid out to guide the process of then tracking the elimination of poverty. This is also a unique opportunity for UW to become the leader of a community-wide "Collective Impact" approach where they are the facilitator and navigator for many organizations working to alleviate poverty. Lastly, with this approach comes a threat of wasting time and energy through the issues that collaboration presents: getting all organizations to utilize the same language and understand the same definition of poverty. This will also depend on the amount of funds available for UW's partner organizations to track their outcomes from their programs. Lastly, the greatest threat to UW in the future is the careful selection of the right evaluative indicators in order to track the communities progress out of poverty. If the wrong indicators are selected, there may be a mistracking of the real levels of poverty within the community.

III. POVERTY IN TERMS OF DEPRIVATION

Countries, international organizations, and small communities alike have all tried to work to eliminate poverty in their territories. To begin to tackle the problem of poverty, the following questions must be answered: What does poverty look like? How do we know how "poor" an individual is? How we understand and answer these questions ultimately decides *how* we will provide aid to those who are less fortunate. There is no one approach to answering these questions that clearly supersedes the rest, therefore, careful consideration is needed to fully understand the weaknesses and strengths of many possible approaches. Whatever approach is applied will not only guide the way poverty is understood within a community, but will also determine effectiveness of alleviating poverty.

The Income Approach

The most intuitive and obvious indicator of poverty is income level. It is easy to understand that with more financial resources (more income), an individual is able to live a better life and consume the resources she or he needs. Many organizations have taken the income approach, including United Way of Wayne and Holmes Counties. The current measure that UW uses for income poverty is the federal poverty line at 200%. According to federal guidelines, a

family of four would be in poverty if its income was less than \$24,250 (US Department of Health and Human Services, 2015). United Way recognizes that families above this level of income are still struggling with basic necessities such as housing, utility bills, and food. Therefore, UW has increased the poverty limit for a family of four to \$48,500. By this standard, the number of people in Wayne and Holmes counties living in poverty increases from 11,000 to 42,000, thus providing a much more inclusive picture of the number of people struggling to live on their current income. This expanded number is a significant strength in United Way's approach in that it attempts to extend the line of who the community considers to be impoverished as it includes families and individuals who are making enough to survive, but still undergo the stress of financial insecurity (United Way Community Assessment 2014).

A significant flaw of this approach is one that many models critique: poverty has multiple dimensions in addition to income (Alkire & Foster, 2011; Waglé 2008, 2009, 2014; Clark, 2006). Therefore, an accurate picture of who is and is not in poverty is not depicted if income is only taken into consideration. How then do we understand poverty if it extends beyond income? And importantly, what are the other factors and why do they matter to a person's well-being? In a monumental book, *Development as Freedom*, philosopher and economist Amartya Sen attempts to answer this dilemma.

Deprivation of Capabilities Approach

According to Sen, poverty is much more than falling below a certain level of income. The attainment of income and wealth in themselves are not in themselves valuable, but allow for more freedom to live a life one has reason to value (Sen, 1999). From this perspective, the ability to make choices about one's life becomes a vital indicator of one's relative poverty. The inability to make such choices is deemed a "capability deprivation." By this, Sen means individuals have less choice and fewer opportunities to exercise their reasoned agency (Sen, 1999). Sen's theory of capabilities reasons that two individuals can have the same resources, yet may differ in their abilities to develop those resources into something valuable (Robeyns, 2011). For example, two individuals may have the same achievement in academics, such as obtaining a Bachelor's Degree, but the individual with better health and financial support from their family will be able to do more with the degree than with the individual with poor health and no financial support. It is critical to pay attention to the freedoms needed by individuals to pursue the ends of their

choosing. Income, as Sen sees it, is only a means to certain ends, an instrument of sort. Therefore, income is a mild indicator of poverty in that it has the ability to affect capabilities. A lower income may lead to decreased nourishment, but it is clear that it is only one influence on capabilities out of many (Sen, 1999).

Functionings and Capabilities

Sen's capabilities approach distinguishes "functionings" and "capabilities," when discussing his theory of poverty. A functioning refers to the outcome a person can manage to do, in other words, what they achieve. This can be anything from obtaining a high school degree, to securing shelter, or to receiving adequate nourishment. How well a person can achieve any given functioning depends on their capabilities, or what Sen refers to as "freedoms." This means the actual ability to choose and pursue one's goals, or functionings. Having a good set of capabilities allows one to live the lifestyle of their choosing (Robeyns, 2011). The more capable an individual is, the larger set of functionings they will have to choose from. For example, when one has the capability of health, they have the freedom to choose from a wider range of higher waged jobs, which is a functioning to secure income. Sen believes a deprivation, or a reduced access to freedoms, is a key cause of poverty.

Applications of the Deprivation of Capabilities Approach

Many models of poverty are expanding now to encompass Sen's theory of poverty as a deprivation of capabilities. International organizations, such as the United Nations and European Union, as well as small communities are now including factors such as access to health care, educational attainment, and access to services (transportation and awareness of services) into their understandings of poverty. For instance, a family of four may be making \$50,000 a year, but has a serious illness in the family. With poor health care insurance and access to services, the income of this family is depleted down to a level of poverty. Another example may be where a family is making the same amount of money, but due to reduced access to affordable housing, is spending 40% of their income on rent. They too should be considered to be in poverty since they do not have enough money to focus on different resources other than housing, despite their apparent sufficient income.

Deprivations that concern a population vary widely from community to community. Whereas people of developing countries may be deprived in capabilities reflected by a high morbidity rate, undernourished children, and high percentages of illiteracy, people in poverty in a developed country may suffer from an entirely different set of capability deprivations (Sen, 1999). An unemployed individual in the United States may instead suffer from social exclusion, loss of self-sufficiency, and a decrease in self-confidence (Sen, 1999). In both cases, suffering from these effects reduces one's ability to pursue the end of their reasonable choosing.

Limitations

A notable strength of Sen's work, as seen by David Clark with the Global Poverty Research Group, is its inherent flexibility. Sen never sets forth a definitive set of capabilities that one should exclusively acknowledge. Instead, he provides examples and suggestions such as "live long, escape avoidable morbidity, be well nourished, be able to read, write and communicate, take part in literary and scientific pursuits and so forth" (Clark, 2006). This also can be reasoned into a weakness, because it limits the immediate applicability of Sen's theory to practice in tracking the numbers of people in poverty. However, in response to this critique, Sen argues that deciding what capabilities are important for a fulfilling human life is a discussion that should be left to specific communities and their key members (not just the elite, or politicians). This step is vital for assessing what the relative picture of poverty is in any given community.

IV. DATA FROM THE COMMUNITY

United Way has already completed this step to Sen's framework earlier this year. As stated before, deprivations that impact poverty in a certain population vary widely from community to community. United Way has done a superb job with reaching out to the community to understand what the most evident deprivations are within Wayne County. UW did this by conducting community surveys known as "community conversations". Here, members of the community living in poverty, individuals working in nonprofits, faith-based, education-focused and government leaders, answered two main questions: What are the contributing factors to poverty and what are the barriers to moving out of poverty? By looking at these "community conversations", one can obtain a greater comprehension of what the community perceives as the

main problems in Wayne county. Through these community surveys, constant themes were brought up, the main ones being education, health, and income. There are specific factors that contribute to poverty within these three buckets that have been repeatedly . The most evident answers of the community within these surveys have been tallied up and can be seen in Table 1 along with the amount of times these specific factors were mentioned by the community in the parenthesis.

Income	Education	Health
lack of job training/skills (49x)	lack of education/undereducated (51x)	substance abuse/addiction (45x)
low/unlivable wages (33x)	literacy (3x)	mental health (38x)
under/unemployment (28x)	cost of education/higher education (3x)	physical disabilities/disease (9x)
lack of employer flexibility (1x)	time to invest in education (1x)	lack of health care (2x)
	access to education (1x)	unplanned pregnancies (1x)

Table 1. Answers from the Community Surveys

Indicators of poverty were determined from the community members' responses. The community members' responses indicated that the biggest income issues are the lack of job training, low wages, and unemployment, while the biggest educational issue is the lack of education, and lastly the two most evident issues with health include substance abuse and mental health. These are the most evident issues pertaining to poverty in Wayne county and can be used as informative indicators. Informative indicators of poverty are indicators that are not applicable to policy, but demonstrates what factors indicate that a person is in poverty within Wayne County. These indicators were constructed based on various sources. These contributors to

poverty stated by the community can also be seen in demographic data about Wayne County that has been collected by various organizations in recent years (such as from NEIRO, United Way 2014 Community Assessment, and “And How are the Children 2014” from Wayne County Family and Children First Council). This demographic data focuses on statistics about health, education and economics in Wayne county. Along with this demographic data, information from what the community has expressed as the contributing factors of poverty, and research about poverty were all used in determining what indicators were chosen. Further elaboration on the indicators in their respective buckets will now be provided below. (See Table 2)

The distinction between informative and evaluative indicators is crucial to identify. The informative indicators proposed provides a framework for which United Way’s community partners can begin to understand the full picture of poverty. Specifically, these partners can now see how each of their respective target areas interacts with one another to affect any given individual deprived of certain capabilities. However, what these indicators presented cannot do at this time is evaluate UW’s community partner programs for their effectiveness in reducing the multidimensional measures of poverty. It is important to be able to draw a direct connection between a program’s outcomes and the subsequent effect on the condition of poverty. If algorithms proposed by Wagle (2009, 2012, 2014) are applied, adjusted headcounts can be produced that inform what deprivations are occurring (often simultaneously), and which of the categories is most intensely felt by an individual or a community. This type of headcount, although it should be kept up to date, cannot inform the relative effectiveness of individual programs and agencies. Many researchers and economists alike are keen on this distinction. It is well understood that, “past ‘evaluations’ that only provide “qualitative insights into processes and do not assess outcomes against explicit and policy-relevant counterfactuals are now widely seen as unsatisfactory” (Ravallion, 2005). It is vital to carefully draw a connection between programs and their relative effect on shifting the picture of poverty in Wayne and Holmes Counties.

It is also important to note the distinction between leading and lagging indicators before introducing these indicators. Lagging indicators of poverty are those that are measured after an event has taken place (Investopedia). Examples of lagging indicators from the indicators we provide include high school graduation rates and measuring how many people live at or below the 200% poverty line, since these indicators report information from the past, typically a year

after the event took place. In contrast, leading indicators are indicators that signal future events, such as what leads to poverty in the present (Investopedia). An example of a leading indicator from the list we have provided is access to mental health services, since the number of mental health clinics can signal whether mental health needs are able to be met. Another example of a leading indicator from the indicators we have provided is health insurance, since the cost of health insurance can signal the likelihood of one actually having health insurance. This is important to note for when UW is developing evaluative measures, as leading indicators may be more helpful in predicting future poverty. A list of all of the indicators within the three buckets of income, education and health as well as an elaboration on each of their importance can be seen below in Table 3.

Income	Education	Health
37% living below the 200% poverty line (50% of which are 18 year olds and under)	15% of individuals over 25 do not have a high school degree	Only 47% of mental health needs met (lower than NE Ohio is 54%)
6% unemployment rate	70% living in poverty have a high diploma or less	15.5% without health insurance coverage (highest among 18-34 year olds 22-22.9%)
50% qualify for free or reduced lunch	Less than 50% of students entering kindergarten are ready	Increase in children entering custody 100 to 176 due to parental substance abuse

Table 2. Data of Wayne County 2014

Income	Education	Health
200% Poverty Line	Kindergarten Readiness	Diabetes
Free and Reduced Lunch Rates	3rd Grade Literacy	Access to Mental Health Services
Unemployment	High School Graduation Rates	Health Insurance
		Drug Abuse

Table 3. Informative Indicators of Poverty in Wayne County

A. Income Indicators

There are important contributing factors of poverty that are related to income seen in the community surveys and the demographic data on Wayne County. The community has expressed that the main concerns with income is job-related. For example, as can be seen in Table 1, the most evident contributing factors include lack of job training/skills, unemployment and low wages, which all pertain to the job market. Issues with jobs in Wayne County is also evident if one looks at the unemployment rate that was obtained through demographic data. The unemployment rate is currently 6% in Wayne county, higher than the state of Ohio’s rate (5.2%). Thus, by monitoring the unemployment rate one can indicate whether the people in Wayne County need help regarding job-related issues.

Based on these job-related issues, measuring how many people are at or below the 200% poverty line is also a good indicator to use to inform United Way of what poverty actually looks like in Wayne County. This indicator provides a general picture of how many people are actually in poverty as the current poverty line is not realistically portraying it and it is also the only indicator that UW has been using to look at poverty. Comparing the minimum wage and the living wage of families is also an important aspect to look at. According to the United States Census Bureau, the average family size in Wayne county is 3.17. Therefore a family of three (two adults and two children) in Wayne county would need to have a wage of \$18.21 per hour, given that only one of the adults is working. However, if the family of three consists of one adult

and two children, such as in a single mom situation, the hourly rate that an individual must earn to support their family is \$23.72 (Living Wage Calculator). This is an issue as the living wage for a typical family in Wayne county is significantly higher than the current minimum wage (\$8.10) that these families tend to be earning. Another indicator that can help further determine whether a family is struggling with income is by looking at the proportion of children that receive free or reduced lunch. This will help indicate whether families are struggling with income, since it will reveal if a family cannot pay for meals at full price, thus living in poverty,

B. Education Indicators

In terms of education, the community was right in expressing concerns about being undereducated as a contributing factor of poverty. There is a need to improve school readiness and early childhood education, since individuals with a solid early education tend to have a higher income in the long run (The Annie E. Casey Foundation, 2014). The importance of education on income is evident, as the higher education one has, the higher paying job one can obtain. In order to indicate whether one is undereducated, 3rd grade literacy will be applied as it is a long term predictor of educational success that is easily measured. It is important to measure the education of children at the earliest stage possible as well, which is why Kindergarten Readiness is another important indicator within the education bucket. High school graduation rates can also be used to indicate whether the community is undereducated and in poverty as high school graduation impacts an individual's life greatly. For example, high school graduates have better health outcomes, make healthier choices and are less likely to engage in risky behavior (c.f. The Annie E. Casey Foundation, 2014). If one graduates high school they will have more job opportunities open as well as the option to obtain a higher education.

C. Health Indicators

Regarding health, the community was also correct in addressing substance abuse as a contributing factor of poverty. Teen substance abuse has been found to be associated with poor academic performance and increased risk of dropping out of school (The Annie E. Casey Foundation, 2014). Thus, substance abuse can consume one's life and distract them from academics and working, inhibiting them from taking advantage of their full potential. Disease was also expressed as a contributing factor of poverty as disease can inhibit a person's ability to

reach their full potential by prohibiting their power to work or learn. Disease is not only a contributing factor of poverty but can also be one of the consequences of living in poverty as, “low-income American adults also have higher rates of heart disease, diabetes, stroke, and other chronic disorders than wealthier Americans” (Income and Health Initiative: Brief One, 2015).

Another indicator of poverty from the health bucket is access to mental health services. Like physical disabilities, mental disabilities can also contribute in putting people in poverty. If a person has a mental health issues and does not have enough money to seek help, their mental state will worsen, thus deepening them into poverty. Income is also related to mental health. “Compared with people from families who earn more than \$100,000 a year, those with family incomes below \$35,000 a year are four times more likely to report being nervous and five times more likely to report sadness ‘all or most of the time’” (Income and Health Initiative: Brief One, 2015).

The last indicator that was seen as a contributing factor of poverty by the community was the access and affordability of health care. Access and affordability of health care is directly related to poverty as, “people with low incomes tend to have more restricted access to medical care, are more likely to be uninsured or underinsured, and face greater financial barriers to affording deductibles, copayments, and the costs of medicines and other health care expenses” (Income and Health Initiative: Brief One, 2015).

D. Social Inclusion

Our research revealed another key factor to understanding multidimensional poverty: social inclusion and exclusion that can occur within a community. Especially when addressing poverty within the context of the United States, many economists and researchers are arguing for models to take into account the deprivations that can occur by means of social exclusion (Waglé, 2009, 2012, 2014; Chakravarty & D’ambrosio, 2006). Social exclusion is when an individual is “disallowed full participation in broader social, cultural, and political systems” (Waglé, 2012).

The fundamental exclusion of an individual from the larger context of society gives way to specific capability deprivations. When an individual does not interact with other individuals in the community and does not participate politically, he or she is disadvantaged of further opportunities that might result from such engagement. Sen refers to this capability as a complex one, but an important one nonetheless. He notes that being socially excluded is not only a direct

deprivation, but also has an indirect effect on their ability to secure further economic opportunities that come from social contact (Sen, 1999). Again, we must understand the indicators within the realm of social inclusion to have an impact on both education, income, and health as well. The degree to which a person is socially excluded is also related to their “social class, education level, and living standards,” (Shaaban, 2011). The power of a social resource is evident as it can lead to a job, provide vital information or advice for one’s future progress and well-being, ensure access to services and benefits, and lastly, a moral support.

Therefore, we recommend that United Way includes social inclusion as a fourth indicator of poverty that affects Wayne and Holmes Counties. Again, we used the community’s responses from the conversations collected by UW and found comments related to the deprivation of inclusion. We find that the community lacks support systems, affordable childcare options (which can often be filled by the community if trusting relationships develop), adequate role models and available mentors, and a deprivation of self-worth (See Table 4). All of these problems can be better aided by increased social contact and inclusion in the community. These findings inform our informational indicators in combination with how the research has approached measurements of social inclusion. From the research, we found that Waglé (2014) defines social inclusion indicators as (1) the number of people seen outside of work, (2) whether an individual has voted or not, and (3) the number of socio-cultural organizations a person might belong to. Therefore, we advise these three indicators, which can be seen in Table 5, in addition to looking at the need for childcare, the number of mentors an individual obtains and the need for support systems, with the hope that when social resources are increased, the need for additional outside support systems will decrease.

Social Inclusion
Lack of Support System (13x)
Lack of Childcare (7x)
Lack of Role Models/Available Mentors (5x)
Issues of Self-Worth (1x)

Table 4. Answers from Community Surveys regarding Social Inclusion

Social Inclusion
Number of People seen outside of work
Availability of Child Care Services
Number of Socio-Cultural Organizations involved in
Number of Mentors/Role Models in Life

Table 5. Social Inclusion Indicators

E. SOPHIE’S STORY

To provide a clearer image of what multidimensional poverty looks like in Wayne county, we have developed a narrative based on the responses from the community to show how these different factors can impact one person, who has been given the name Sophie. Although Sophie’s story is made up, it is based off of actual life circumstances of individuals living in this community. We hope to connect the audience with a greater understanding of how multidimensional poverty can impact lives in multiple facets. Through Sophie’s deprivation of capabilities, she is unable to achieve the functionings she wants for her life. As a reminder, a functioning refers to the outcome a person can manage to do, in other words, what they achieve, such as a goal. Capabilities refer to how well a person can achieve any given functioning or, in layman’s terms, the actual ability to choose and pursue one’s goals.

Sophie is a single mother living in Wooster, Ohio. She has a high school diploma and earns \$10 per hour working as a secretary. She goes to work in her unreliable, run-down car when it is working, but she occasionally turns to the use of inconvenient public transportation. Sophie is technically in income poverty because she is living below the poverty line at 200%. She is trying to support her two children, Max, age 16, and Mackenzie, age 10. Sophie's youngest child, Mackenzie, has difficulties in school due to her autism. Sophie gets called in frequently by Mackenzie's school due to the special attention her daughter needs to accommodate her learning experience. She has an ample amount of meetings with teachers about Mackenzie and what is best for her. Thus, it is difficult for Sophie to maintain her job as she must leave work to attend to Mackenzie's disability. This not only adds stress on her financially, but emotionally as well. In addition, Sophie cannot afford to always buy the healthiest food options, and her diet has led to the development of diabetes. She has poor health insurance which makes it hard to find affordable health services for her children and her diabetes. Sophie is not involved with the PTA at Wooster City Schools for her children, not only because of her depleted energy, time and resources, but primarily because of her social anxiety. Sophie is very much aware of her economic status, which makes her uncomfortable in large crowds due to the lack of self-confidence that occurs when she talks to someone of higher class. Her deprivation of capabilities means that she can't participate in this social outlet. Sophie has no family in town and her only social interactions outside of her workplace are with other working class couples.

Sophie is not only in poverty according to income standards, but she is also impoverished within educational, health, and social inclusion. She is deprived of a higher education to gain a better paying job. She is also deprived of a well-paying job, and therefore cannot afford to take care of her body. Additionally, because she is deprived of a healthy, diabetes-free lifestyle, she cannot expel her energy into social activities. Sophie is deprived of social interaction with others outside of her familiar realm, and therefore is not fulfilled and has very little self-worth. She is trapped in the multidimensional storm of poverty, where her capabilities are deprived in overlapping scenarios. These are contributing factors of poverty that can be applied to various individuals within this community.

Income	Education	Health	Social Inclusion
200% Poverty Line	Kindergarten Readiness	Diabetes	# of People seen outside of work
Free and Reduced Lunch Rates	3rd Grade Literacy	Access to Mental Health Services	Availability of Child Care Services
Unemployment	High School Graduation Rates	Health Insurance	# Socio-Cultural Organizations
		Drug Abuse	# Mentors/Role Models in Life

Table 6. Illustration of Sophie’s deprivations by multidimensional category.

V. RESULTS-BASED ACCOUNTABILITY

The use of the Results-Based Accountability (RBA) guide (Results Leadership Group, LLC, Results-Based Accountability Guide, 2010) is a strategic procedure used to map out the process that United Way of Wayne and Holmes Counties will use to reach the Bold Goal. RBA, a different actionable approach and way of thinking designed to improve lives and communities, was developed by Mark Friedman, founder and director of the Fiscal Policy Studies Institute. This guide starts with the ends and works backward to reach the means in a step-by-step process. UW is using this RBA template to help improve the lives of children, families, and community members.

1. The first step is to decide on an end result for a community.
 - UW has already placed the Bold Goal of 10,000 people out of poverty by the year 2025 as the “ends.” This is a great starting point because it identifies a population, a desired quality of life (out of poverty), and speaks to a myriad of audiences within the whole community.

2. The second step of the model is to assess progress by using a graph. To assess achievement of UW's Bold Goal, two lines must be drawn. The first is a historic baseline that ideally outlines at least five years of data. The second curve is a forecast of the next three to five years. The idea behind this step is to turn the curve toward a positive trend based upon decisions made in step three.

3. The third step of the RBA model is to tell the story behind the curve. This is where we discuss the key factors that determined the historic baseline, and identify the positive and negative forces that are influencing the curve of the baseline. Progress is turning the curve of the baseline or augmenting the curve if it is already going in the right direction.

- In United Way's case, progress is moving people out of poverty. This step identifies the contributing and restricting factors of progress such as, what poverty looks like in Wayne and Holmes Counties and how one knows if they are impoverished. The story of poverty in Wayne county is revealed through community conversations UW facilitated in which the community relayed the greatest needs.

4. The fourth step of the model identifies partners who have the ability to turn the baseline curve. These potential partners can be identified by analyzing the story of the curve in the step above.

- Partner organizations can respond to the needs voiced by the community through the new lens of poverty tailored for Wayne County. These community partners of United Way will receive financial support to carry out their services to address these particular areas of need. These partners will use this aid with the indicators within the education, health, income, and social inclusion categories as a guide. The programs use UW's funding to move people out of poverty in a measurable way. This step has not yet been achieved, but partners will be decided after continual community assessment, continual data collection from the informational indicators provided, and finally after a consultant evaluates those organizations that are making progress. These community partners could consist of organizations already working with UW or new organizations that are driving change to get people out of poverty.

5. The fifth step outlines strategies that could turn the baseline curve, or progress. These strategies should be the linking point between the end and the means. The strategies should be

evidence-based and the community should be the one outlining the needs that the strategies are trying to fix.

- This multi-year process could use existing activities and new ideas to address the root causes of poverty in Wayne and Holmes Counties. Our strategy is to include social inclusion into the way in which poverty is viewed.

6. The sixth and final step of the RBA model is ultimately the means in which to turn the curve of the baseline. This is where the actionable strategy is selected and implemented by the organization and the agency partners. The strategy should be chosen on its feasibility, specificity, ability to impact progress, and community consistency and value.

- To turn the baseline curve, as in bring people out of poverty, we are specifically proposing the strategy to view poverty in a different lens: poverty as the deprivation of capabilities and functionings. Our strategy outlined in the sections above is a way to progress and reach the end performance measure of 10,000 people out of poverty by the year 2025.

The benefits of using this RBA approach are the actionable steps, the easily-outlined process, and the collaborative and transparent model that will account for the performance of community programs. In order for the RBA model to be successful within the community, systematic and continual data collection must be achieved. The community is the one that needs to express where the areas of greatest need are. These needs can change so easily and can change annually. For example, unemployment could be the greatest problem one year, and the next year high housing costs are the problem. Thus, the data collection and actionable programs geared toward progress should cater toward the needs of the people. For progress, which is people out of poverty, the funded programs must address the greatest multidimensional needs.

VI. FIT & FEASIBILITY

Addressing the fit and feasibility of the suggested lens of poverty will inform us whether or not viewing poverty as a deprivation is suitable for United Way and if it can be done in accordance to UW operational activities. Achieving the Bold Goal requires an inclusive measure of poverty to account for all individuals who experience multiple aspects of poverty. Using the

four dimensions mentioned above, we can determine if tackling poverty through Sen's lens will meet the goal of UW in accordance to their operational activities.

United Way currently employs the federal poverty line at 200% as their measure of poverty. This measure does not incorporate all individuals in poverty because UW has recognized that poverty is multidimensional in nature, therefore an income-based approach alone does not fit with current standards of UW. While the data for an income-based approach is easily gathered, it is considered a lagging measure that acquired from the U.S. Census. Thus, a more sophisticated approach must be utilized in order to meet the Bold Goal of UW and ensure a relative fit for this community.

Observing poverty from a deprivation lens will be a suitable fit for UW. Due to the variation of the nature of poverty from community to community, using the deprivation approach will allow UW to specifically examine the nature of poverty in Wayne and Holmes Counties and determine the actual deprivation of capabilities. Then, using those deprivations, UW can formulate descriptive indicators that will accurately measure poverty. Such a method can fit into several communities, as universal measures do not account for differences in characteristics and uniqueness of individual communities. UW is excellent at gathering data, as shown in the community conversations; UW was able to determine which capabilities the community was deprived of and construct informative indicators based on those deprivations.

Community collaboration is key to this deprivation of capabilities approach. UW's mission is to mobilize community resources. That can only be done by providing both the funds and the information to specific partner programs aimed at alleviating poverty. The whole purpose of UW is to be the community leader in addressing the multidimensional facets of need. The capability deprivation approach aligns directly with the core foundations of what UW is built upon.

Implementation Plan

Conventional Evaluation

The next step for UW is to develop evaluative indicators through the lens of poverty we have proposed to track the effectiveness of the programs they fund. Using the compiled list of indicators developed from our team, they can contract with consulting firms that have research expertise, and the capability of conducting field research and the skills needed for data

collection. Following the collection of data, these consulting firms are able to organize and analyze the data in order to construct evaluative measures of poverty. One particular company, Focus Pointe Global (2015) provides the service of evaluation consulting. They have trained staff with appropriate qualifications. Specializing in field research, they are able to collect qualitative and quantitative research data and coordinate focus groups.

In order for such process to occur and be successful, UW staff and administrator must be specific on the informative indicators. Any miscommunication between the UW stakeholders and consulting group could result in improper evaluative measures. Avoiding these occurrences is crucial, especially considering the time constraint on collecting data. If miscommunication is avoided, the UW staff could easily become very knowledgeable of the reports and measures generated and UW can conduct these evaluations periodically to track the progress made on reducing poverty. This will also eliminate the cost of using outside resources.

Participatory Monitoring & Evaluation

Alternatively, as UW seeks to move towards a community-based impact approach, we suggest that UW consider The Participatory Monitoring and Evaluation (PM&E) approach to develop evaluative measures. The PM&E approach involves multiple stakeholders, as opposed to one outside evaluator, to decide what measures to implement and how they will be collected and analyzed. Stakeholders can be local community members, community partners, beneficiaries, an evaluator, etc. The stakeholders are involved through the processes of developing an evaluation plan, which includes identifying the important outcomes to the community, planning the design for evaluation, selecting the measures, determining the methods, collecting and analyzing the results, and finally concluding from the results to inform further action plans to better a program's outcomes. (Zukoski & Luluquisen, 2002).

There are a few key differences that distinguish the PM&E approach from conventional evaluation approaches where an outside evaluator comes in as an objective expert on program evaluation (see Table 7). Whereas traditional consulting requires the bulk of the work to be done by an outside evaluator, the PM&E approach relies on community stakeholders to create, implement, and evaluate programs with the selected measures. The PM&E however, may still utilize an evaluator, whose role is closer to that of a facilitator rather than an expert leader.

There are costs to the PM&E approach. First and foremost, PM&E requires a significant amount of time, effort, and processual change from not only United Way, but from all of the involved stakeholders. Creating an effective space where diverse voices and perspectives can be heard and given adequate respect and power in the decision making process is a challenge in itself. Given the fact that this process requires many different stakeholders, there is also increased potential for conflict. To remedy this potential setback, it is important to initially determine who will make the decisions and preemptively create a process to address such conflict (Zukoski & Luluquisen, 2002). PM&E also requires a shift in roles of sorts which can often be met with resistance (Sokol-Oxman, 2015). Therefore, it is vitally important for the community to have the common agreement and preparedness towards a collective approach before the process begins. It's also important to be especially clear on the current task being addressed by each stakeholder or set of stakeholders, the approximate time commitment, and the inevitable need for flexibility (Estrella, 2000).

Findings have found that this approach not only allows for multiple stakeholders to learn and engage in the process of evaluation, but it “further enhances the quality and credibility of monitoring and evaluation” (Sokol-Oxman, 2015). It is unique in that it respects a diverse set of voices from the community, especially those of the least powerful and most affected by poverty (Zukoski & Luluquisen, 2002). By hearing these often marginalized voices, PM&E empowers individuals and community partners to take ownership of creating and tracking the change they want to see in the community.

Differences Between Participatory and Conventional Evaluation		
	Participatory	Conventional
Who drives the evaluation?	Community residents, project staff and other stakeholders	Funders and program managers
Who determines indicators of program progress?	Members of community groups, project staff and other stakeholders; evaluator	Professional evaluators and outside experts
Who is responsible for data collection, analysis and preparing final reports?	Shared responsibility of evaluator and participating stakeholders	Professional evaluators and outside experts
What is the role of the local evaluator?	Coach, facilitator, negotiator, "critical friend"	Expert, leader
When is this type of evaluation most useful?	When: <ul style="list-style-type: none"> • there are questions about program implementation difficulties • there are questions about program effects on beneficiaries • information is wanted on a stakeholder's knowledge of a program or views of progress 	When: <ul style="list-style-type: none"> • there is a need for independent judgment • specialized information is needed that only experts can provide • program indicators are standardized, rather than particular to a program
What are the costs?	<ul style="list-style-type: none"> • Time, energy and commitment from local residents, project staff and other stakeholders • Coordination of many players • Training, skills development and support for key players • Potential for conflict 	<ul style="list-style-type: none"> • Consultant and expert fees • Loss of critical information that only stakeholders can provide
What are the benefits?	<ul style="list-style-type: none"> • Local knowledge • Verification of information from key players (validity) • Builds knowledge, skills and relationships among community residents and other stakeholders 	<ul style="list-style-type: none"> • Independent judgment • Standardized indicators allow comparison with other research findings

Table 7. From Zukoski & Luluquisen, 2002. Participatory Evaluation: What is it? Why do it? What are the challenges?

Costs/Benefit Analysis

In this section of the business plan, we will assess the cost benefits of both approaches. The Bold Goal of UW is to get 10,000 out of poverty by 2025, in order to achieve this goal, they will have to utilize one of the two suggested approaches to get an accurate measure of poverty in Wayne and Holmes Counties. The first approach of using the services of Focus Pointe Global, UW is allowing an outside consulting firm to come conduct market research, collect and analyze the data. Data can be collected through several ways and the chosen method depends on the goal of UW. Therefore, the suggested method has to be extensive enough that will capture the entire picture of poverty.

The benefits of using Focus Pointe Global revolve around the concept of primary research. Primary research will allow UW to get specific results to specific dimensions of poverty. It is more inclusive approach because it can be broken down to qualitative or quantitative research. Using a quantitative survey approach, Focus Pointe Global can collect specific data from the population. Surveys can be administered via email, mail, or phone. The process of conducting these surveys involves identifying the population, formulating the survey, conducting the survey, and analyzing the data.

The costs of using Focus Pointe Global is that the costs associated with it are costly, based on the feasibility assessment provided by Focus Pointe Global, the costs are provided in the table below:

Survey Methods		
Phone	Email	Mail
\$5,000-\$15,000	\$3,000-\$5,000	\$5,000-\$7,000 for 200 responses

These costs are estimated based on the informative indicators provided. Additionally, the costs will vary depending the number of indicators, including whether UW purchase a mailing list, who designs the questions for the survey, what communication channel UW uses to send the survey, and how UW want the results analyzed. Lastly, primary research conducted by Focus Pointe Global could be a lengthy process, depending on the method of surveys and analysis, this process could take up to 6 months or even a year.

The PM&E approach also have benefits and costs associated with it. Since UW is great at bring people together through their yearly campaigns and fundraising efforts, This approach will be very beneficial in terms of building knowledge and creating relationships within the community, it will also provide validity of key players who invest ample time and effort in UW campaigns. The costs associated with this approach is that it requires a significant amount of time, effort, and processual change from UW members and all stakeholders involved. Additionally, it involves coordination of many players which could create the potential risks that ultimately slow down the process.

VII. FINAL RECOMMENDATIONS

From the wealth of research provided in this report, we have compiled four recommendations for UW to ensure the continual success and progress towards the bold goal of 10,000 out of poverty by 2025.

1. **To include “Social Inclusion” as a future focus group:** Our research showed that social inclusion is a powerful force that can exacerbate the condition of poverty. The community voiced a similar concern over issues with the social landscape within Wayne and Holmes County. Therefore, we believe it is well worth the time and resources to dedicate a focus group towards the future assessment and measurements of poverty.
2. **To continue yearly community data collection:** In line with Sen’s idea of poverty as a deprivation of capabilities, it is vital to understand the relative deprivations affecting every community, as they may vary greatly. It is also important to also understand that these deprivations can vary within a community over time. Therefore, we believe it is vital for UW to continue to engage with the community and ask about the causes of poverty in Wayne and Holmes County.
3. **To engage with a large community of stakeholders:** Given the understanding that poverty is multidimensional in nature, it is vital for all program providers in the area who work with this population to understand their stake in a larger, complex issue that is poverty. This means that UW’s partners must engage in an effort together to alleviate poverty. This Collective Impact approach will be vital for UW to serve as a backbone organization and mobilize community resources and guide their partners to share a common measurement and understanding of poverty.
4. **To pursue a Participatory Monitoring and Evaluation (PM&E) approach:** The next strategic step for UW will be to develop and implement evaluative measures to measure the impact of programs and initiatives in the community. While conventional evaluators have strengths in providing this service, we believe the PM&E approach compliments UW’s role as a community organizer and leader and fits particularly well with UW’s transition to a more Collective Impact approach. While it will take more time, resources, and organizing, the PM&E approach to developing measurements of evaluation will allow for local nonprofit partners to grow their skills in evaluation, contribute local

knowledge, and create significant ownership and buy-in to the process of creating, tracking, and making meaning of measurements that track the success of their programs.

VIII. RISKS AND LIMITATIONS

Comparable to any business venture, UW will encounter risks along the way. The main problem UW is currently facing is that the poverty measure at 200% does not give an accurate description of poverty in Wayne and Holmes Counties. The biggest risk they could face is using the proposed lens and not achieving the desired level of accuracy. Moreover, utilizing unsupported indicators of poverty can lead to an underrepresentation of individuals in poverty. Furthermore, there are difficulties in determining the actual deprivations individuals face. Additionally, communication barriers can prolong the process. UW must also be cautious when formulating survey questions for the community, as bias may not reveal the real causes of poverty, thus making the Bold Goal harder to achieve.

An additional limitation is that our informative indicators do not at this point account for weightedness of deprivations. For instance, one family may be drastically farther below the 200% poverty line, while another may only be barely below the line. Those two families still may suffer from different levels of poverty. However, many approaches have accounted for weightedness. Notably Udaya Waglé has incorporated weighted headcounts within the multidimensional indicators he utilizes. Therefore, there are methods to account for this particular limitation, but they require further research using equations set forth by experts in the field like Waglé.

Another limitation of our approach is the dependency on community data collection. Community conversations are a critical component to understanding the greatest needs. UW runs the risk of posing questions that do not accurately depict the multidimensions of poverty. Or, the surveys could not capture an accurate representation of community opinion. Leaders of the community, nonprofits, beneficiaries, and other community stakeholders need their voices to be heard in the community data retrieval for an ideal picture of poverty in Wayne and Holmes Counties.

IX.

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