Second Century Vision Funding Conference

April 6, 2021
<table>
<thead>
<tr>
<th>Agenda Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome and Agenda</td>
</tr>
<tr>
<td>Commitment to Diversity, Equity, Inclusion and Belonging</td>
</tr>
<tr>
<td>Second Century Vision</td>
</tr>
<tr>
<td>Regional Investment Strategy and Services</td>
</tr>
<tr>
<td>Requirements for Funded Partners</td>
</tr>
<tr>
<td>Overview of Single Investment Funding Process</td>
</tr>
<tr>
<td>Review of Application</td>
</tr>
<tr>
<td>Funding Timeline and Additional Resources</td>
</tr>
<tr>
<td>Panel for Questions</td>
</tr>
<tr>
<td>Thank You and Adjourn</td>
</tr>
</tbody>
</table>
United Way of Greater Houston (UWGH) joins United Way Worldwide in recognizing that structural racism and other forms of oppression have contributed to persistent disparities which United Way of Greater Houston seeks to dismantle.

The UWGH network:

• Strives to engage community members, especially those whose voices have traditionally been marginalized.
• Works with residents and public and private partners to co-create solutions that ensure everyone has the resources, supports, opportunities and networks they need to thrive.
• Commits to leveraging all of our assets (convening, strategic investments, awareness building, advocacy) to create more equitable communities.

In support of this commitment, UWGH funded partners shall not engage in discrimination based on race, ethnicity, age, gender, gender identity, sexual orientation, national origin, religion, or presence of a disability in the delivery of services.
The vision for United Way of Greater Houston’s second century is to create the opportunity for individuals and families in the Greater Houston community to thrive by leading, serving, influencing and convening the nonprofit social services sector to deliver quality services with exceptional outcomes.
Our Second Century Vision

Bookmark this page and join our email list below to get updates and information about our vision, future funding opportunities, important dates, and more.

For almost 100 years, United Way of Greater Houston has brought together diverse partners and approaches to get to the root of complex challenges holding people back. Our vision for our second century of service is to create the opportunity for individuals and families in the Greater Houston community to thrive. We will do this by leading, serving, influencing, and convening the nonprofit social services sector to deliver quality services with exceptional outcomes.

UWGH’s Second Century Vision Webpage
www.unitedwayhouston.org/scv

Upskill Modules via Teachable Platform
Transformational Change

**WHO**  
Poverty population and ALICE (14% poverty + 33% ALICE = 47%)

**WHAT**  
Providing the opportunity to attain sustainable quality of living via: financial stability, supported by early child and youth development, health care and safety net

**WHERE**  
Greater Houston Area (4 county coverage area)

**HOW**  
Transformational change to how UWGH will approach its work
Three areas of focus ...

1. Right agency expertise connected
2. Integrated coaching and client support
3. Client journey tool and resource map

... to create an integrated client journey

Example Client Journey

- Program entry
- Child care
- Workforce coaching
- Domestic violence services
- Parenting education
- Tax prep
- Program graduation
- Financial coaching
- Transportation assistance
- Child/youth development
- Program graduation
- Early childhood education
- THRIVE
- Parent service
- Child service
Regional Investment Strategy and Services

All future funding will be invested within 3 categories across the Integrated Client Journey:

- **Safety Net Services** - basic needs and freedom from violence
- **Integrated Services** – financial stability, early childhood and youth development, and health and behavioral health services
- **Navigators** serving Integrated Client Journey

... to create an integrated client journey
## Services along Integrated Client Journey

<table>
<thead>
<tr>
<th>Safety Net Programming</th>
<th>Integrated Programming</th>
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<tbody>
<tr>
<td><strong>Basic Needs:</strong></td>
<td><strong>Financial Stability Programs:</strong></td>
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<tr>
<td>• Services such as rent/mortgage assistance, utility assistance, technology access, food, shelter, and transportation assistance</td>
<td>• Vocational training and employment coaching;</td>
</tr>
<tr>
<td><strong>Freedom from Violence:</strong></td>
<td>• Financial Coaching and Training; and</td>
</tr>
<tr>
<td>• Immediate, short-term services focused on safety for those fleeing domestic violence, human trafficking, or vulnerable populations such as refugees.</td>
<td>• Safe, affordable financial products and services</td>
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<td><strong>Early Childhood and Youth Development Programs:</strong></td>
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<tr>
<td></td>
<td>• Early childhood education/child care;</td>
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<td>• Out of school time programming;</td>
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<td>• College and career readiness programming; and</td>
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<td>• Parent engagement</td>
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<td><strong>Health Care Programs:</strong></td>
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<td></td>
<td>• Primary and specialty health care services; and</td>
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<td>• Behavioral health care services</td>
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### Navigators within Integrated Client Journey
13 Priority Regions

Regions were identified based on:
- Density of population with incomes ranging from $0 to the ALICE survival budget threshold
- Density of BIPOC (Black, Indigenous, Persons of Color) – historically disproportionately impacted populations

Currently, there are:
- 8 regions within Harris County
- 2 regions within Fort Bend County
- 2 regions within Montgomery County
- 1 region within Waller County

A searchable database of each region by zip code is available on our website under Second Century Vision
Annual Community Campaign

THE IMPACT WE MAKE TOGETHER

2 MILLION people improved their lives in the last year

100+ strategically chosen services made possible throughout our community

142,000 people helped with basic needs, like food, housing, and health care

75 PERCENT of those in United Way programs gained the skills to enter the workforce

952,000 people helped to rebuild their lives after crises

UNITED WAY ADDS VALUE TO EVERY GIFT

STEWARDSHIP, ACCOUNTABILITY, AND TRANSPARENCY
Your gift is invested directly in services that make a measurable difference in key areas of need. Investment decisions are backed by research, overseen by donors, like you, and continuously monitored.

QUALITY IMPROVEMENT
United Way and our partners are committed to continuous quality improvement. We use data to measure effectiveness, identify existing and emerging needs, and guide strategic decision making.

COLLABORATION
United Way brings people and partners together to share and collaborate, spark partnerships, reduce duplication, and strengthen our community’s social service sector.

CONVENER
We bring together nonprofits, businesses, city and state agencies, and the community at large to best address big issues like disaster recovery, workforce development, and the quality of life for veterans.

MULTIPLIER
When you give to United Way, you get a multiplier on your investment. You are part of a collective effort that improves people’s lives and creates long-term change in our community.
Overview of Investment Strategy

**Funding will be awarded for up to a three-year commitment**

- Results-based flexible funding
- Subject to performance and/or available revenue annually throughout the funding cycle

Dependent upon the agency's budget size and scope of work, we **anticipate total funding amounts** will generally be between $100,000 to $2 million
We want the full suite of Second Century Vision services in each region
• Maximum funding amount would not be awarded to a single agency in one region

Use the interactive regional map to determine how much to request

Investment per region are based upon households with annual income between $0 and the ALICE survival budget, BIPOC, and additional service needs data
• Impact should match funding request
• Request must be intentional, not a dream list

$2 million awards will be the exception, not the rule

We will discuss adjustments to funding requests during the process as appropriate
Investment Strategy

Based on investment strategy for each region, example of investment percentage range for Integrated Client Journey

![Graph showing investment percentage ranges for different categories]

- **Financial Stability**: 35% (bottom) - 40% (top)
- **Basic Needs**: 21% - 22%
- **Early Childhood and Youth Development**: 19% - 22%
- **Health Care**: 13% - 15%
- **Freedom from Violence**: 5% - 9%
Requirements for Funded Partners:

- Integrated Client Journey
- Identifying and Serving ALICE
- Collaboration, Collaboration, Collaboration
- Peer Learning Groups
- Common Metrics and Reporting Requirements
- Data Governance and Data Sharing Model
- Technology Platform for Second Century Vision
- UWGH Standards and Policies
Integrated Client Journey

Three areas of focus ...

1. Right agency expertise connected
2. Integrated coaching and client support
3. Client journey tool and resource map

... to create an integrated client journey

Example Client Journey

- Child care
- Workforce coaching
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- Program graduation
- Financial coaching
- Transportation assistance
- Child/youth development
- Program graduation
- Early childhood education
- Family counseling
- Tax prep

Right agency expertise connected
Integrated coaching and client support
Client journey tool and resource map

THREE PROGRAM AREAS:

Parent service
Child service
INTEGRATED CLIENT JOURNEY

Client Goals: 1) Full-time employment with a competitive wage 2) Improve self-esteem and motivation

INTEGRATED SERVICES

SAFETY NET
Identifying and Serving ALICE

Income will be **assessed at the time of entry and self-reported** by the individual/family.

**Household** – all adults and children who are currently living together

UWGH will fund programs that **primarily serve households that are up to ALICE threshold**

**Kinder Houston Area Survey:** What was your total household income for all members of the household during the past year?

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Program Funding</th>
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<tbody>
<tr>
<td>Less than $12,500</td>
<td>$62,501 to $75,000</td>
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<tr>
<td>$12,501 to $25,000</td>
<td>$75,501 to $100,000</td>
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<tr>
<td>$25,001 to $37,500</td>
<td>$100,001 to $150,000</td>
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<tr>
<td>$37,501 to $50,000</td>
<td>More than $150,000</td>
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<tr>
<td>$50,001 to $62,500</td>
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Collaboration, Collaboration, Collaboration

Work towards a common goal with other service providers to help individuals and families to thrive

- Efficiency and Effectiveness
- Integrated Client Journey
- Population Served
- Leadership Commitment and Buy-In
- Scale and Innovation
- Formalized Agreements
Peer Learning Communities

These are some examples of peer learning communities you may participate in as part of Second Century Vision.

- Regional
- Coaches
- Navigators

Issue areas such as Education, Out of School Time, Financial Stability
Second Century Vision’s Data Vision

We envision an Integrated Client Journey that uses real-time data from UWGH funded partners, 211 Texas/United Way Helpline, and the ALICE report to support individuals and families working toward a sustainable quality of living.

• Data will be used to measure the impact for Continuous Quality Improvement (CQI) and inform investment decisions of the Integrated Client Journey.
• The role of data will be iterative and evolve over time to include community data systems to strengthen the Integrated Client Journey.
• By bringing data together across partners and systems, we are amplifying a collaborative effort that seeks to support individuals and families along their unique journey to sustainable quality of living.
Common Metrics & Reporting Requirements

**Common Metrics** - UWGH intends to have two primary metric categories:

- **Service Performance Metrics**: Data that measures the success of a particular safety net or integrated service
- **Integrated Client Journey Metrics**: Data that measures client progress along the integrated journey

**Reporting Requirements**

- Funded partners will be required to submit quarterly reports
- Technical assistance to support the timely and successful submission of the reports is available through assigned liaisons
United Way of Greater Houston’s Second Century Vision is to create the opportunity for individuals and families in the Greater Houston community to thrive.

Critical to UWGH meeting the demand will be the need to:
1. Accelerate impact as need continues to grow
2. Integrate programs in order to serve greater Houston area most effectively
3. Define data needs, measure and apply toward impact
4. Continue to raise funds to drive impact in the community

Huge demand exists, with 47% of households struggling to make ends meet.
Data Collaboration through Trust

Better **share, align & coordinate** your work

Enhance & appropriately **measure impact**

Control **how your data is accessed & used** (and by whom)

**Be more responsive** to the current and future information needs

**Oversee & monitor data and users** at multiple levels and in real-time

Responsibly & efficiently address **immediate and emerging challenges**
Standards and Policies:

- Outlines what it means to be a funded partner with UWGH
- If funded, will need to agree to Standards and Policies
- Available to view on UWGH’s Second Century Vision Webpage after funding conference
Eligibility for Funding Process

Eligibility:

• Have 501(c)3 designation for a minimum of three years
• Have a minimum of three board members who represent the local community
• Have appropriate insurance
• Provide safety net services and/or integrated services and/or navigator services
• Agencies must have an existing or anticipated presence in and provide direct services to residents in each region for which they are seeking funding
• Align with UWGH’s strategic priorities
• Meet Organizational Review requirements
Applications screened, reviewed and interviews facilitated by community volunteers and UWGH cross-functional staff team
Multiple Region and Program Application Details

Application process:
- Agency completes one application
- Region-specific questions must be completed for each of the regions for which the agency is seeking funding
- Multiple service requests will need to be completed within each region's questions
- Budget must reflect all resources that will be allocated to services within each specific region

Applying across regions and multiple services:
- Agencies can apply to receive funding in multiple regions
- It is not required to apply for funding in multiple regions
- Agencies must have an existing or anticipated presence in and provide direct services to residents in each region for which they are seeking funding
- Agencies can apply for multiple services within a region
Regional Volunteer Teams

Volunteer Recruitment Priorities:

- ALICE voice
- BIPOC representation
- Volunteers who live or work in their specific region
- Passionate about serving their community
- Experienced working with nonprofit organizations
- Controlling for conflicts of interest and biases

Phase 1 & 2

| Organizational Review Volunteers
| UWGH Community Volunteers
| Cross-Functional UWGH Staff |
Components of Application

Application includes 2 components: Organizational Review and Application Questions

Organizational Review includes
- Agency Budget
- Questions and upload links for governance and financial health

Application Questions are divided into two sections
- Agency
- Region

TIP: Fully answer the question and be concise!
A **Navigator** is a professional who uses a **relational, strengths-based** approach to help clients **articulate** and **achieve** their **goals**.
Navigators and Navigation Team

Navigators are “generalists” versus “specialized”

Navigators are not case managers nor counselors
- They use a relational, strengths-based approach to work with clients
- They use coaching skills to help clients articulate and achieve their goals
- Must have the ability to deal with crisis and conflict
- Must work with diverse populations

Navigators are aware of the strengths and resources of the community served

Navigators will use common set of tools and receive extensive training led by UWGH

Navigators are considered part of a Navigation Team
Navigators and Navigation Team Investments

**Navigation Teams funded at select organizations in each of the 13 regions**
- UWGH will fund 20 Navigation Teams across all regions
- Investments up to $100k available for Navigation Team function in an agency
  - Agencies are permitted to apply in no more than 2 regions
  - Navigation Team is housed at an agency, but serves the entire region
    - Agencies must staff a Navigation Team: assign a minimum of one full time Navigator, the pro rata share of staff who will act as a backup to Navigator function, and pro rata share of supervisor
    - Allowable expenses include salary, benefits, cell phone, supplies, laptop, mileage

**Agency may apply for Navigation Team only**
Navigation Team Application

Access the Navigation Team application in the general application

Questions include describing:

• How the Navigation Team fits into your overall organization and programs
• How your agency has served or desires to serve the region
• Where and when clients would have access to navigation services
• What are the characteristics of your ideal Navigator for the region(s) you propose to serve
• How your Navigation Team will be composed, including title and job functions
• How you manage Navigation Team staff transition and onboard new staff
• How the Navigator will respond to a client scenario
Application and Evaluation Process

**Phase 1**
April 2021 – July 2021

- Application Submitted
- Org Review Process Begins
- Application Screensings
- Invitation to proceed communicated to applicants: End of July
- Agency Notifications

**Phase 2**
August 2021 – January 2022

- Application Reviews
- Funding Decision
- Approval or denial communicated to applicants: January 2022
- Agency Interviews
- Onboarding

**Attendees**

- Applications screened, reviewed and interviews facilitated by community volunteers and UWGH cross-functional staff team

**Important Dates**

- Last date to early submit for feedback: May 4
- Feedback for early submission
- Application Due Date: June 7
- Funding Begins: April 2022

**United Way of Greater Houston**

[United Way Logo]
New e-Cimpact Portal


ALL agencies will need to create a new agency profile

- Complete pre-screening questions to determine eligibility for funding opportunity
Funding Timeline

- **JANUARY 29, 2021**
  - Funding Announcement

- **APRIL 6, 2021**
  - Funding Conference
  - Technical Assistance Calls April and May
  - Last date to early submit for feedback May 4, 2021

- **JUNE 7, 2021**
  - Application due date
  - Selected applicants invited to move forward for agency interviews by end of July 2021

- **JANUARY 2022**
  - Funding Announcements Made

- **SPRING 2022**
  - Onboarding and Funding Begins

*This is an estimated timeline that is subject to change*
## Additional Resources

<table>
<thead>
<tr>
<th>Technical Assistance Calls</th>
<th>NPC Trainings</th>
<th>Additional Resources</th>
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<tbody>
<tr>
<td><strong>Grant Writing Refresher by Nonprofit Connection (NPC)</strong></td>
<td></td>
<td><strong>UWGH’s Second Century Vision Webpage</strong></td>
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<tr>
<td>• Wednesday, April 14, 2021 from 9:00 – 10:00 am</td>
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<td><a href="http://www.unitedwayhouston.org/scv">www.unitedwayhouston.org/scv</a></td>
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<tr>
<td>• Thursday, April 22, 2021 from 3:00 – 4:00 pm</td>
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<td>• Training and Upskill Modules</td>
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<tr>
<td>• Tuesday, April 27, 2021 from 12:00 – 1:00 pm</td>
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<td>• More information on ALICE</td>
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<tr>
<td>• Tuesday, May 4, 2021 from 1:00 – 2:00 pm</td>
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<td>• Funding Announcement</td>
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<tr>
<td>• Wednesday, May 12, 2021 from 9:00 – 10:00 am</td>
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<td>• Slide Deck &amp; Recording of Funding Conference</td>
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<tr>
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Panel for Questions

**Moderator**
Dr. Angel Harris  
Vice President and  
Chief Advancement Officer

**Panelist**
Margaret Oser  
Vice President,  
Mission and Strategy

**Panelist**
Curtis McMinn  
Sr. Manager,  
Mission and Strategy
Thank You and Adjourn

Please complete feedback form