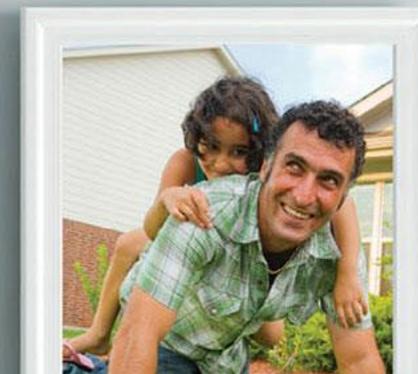
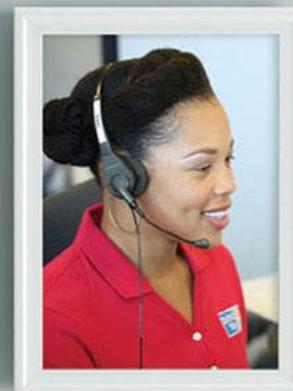


# SECOND CENTURY VISION

DO SOMETHING ABOUT IT



## Second Century Vision Funding Conference

April 6, 2021

# Second Century Vision Funding Conference Agenda



**Welcome** and **Agenda**

Commitment to **Diversity, Equity, Inclusion and Belonging**

**Second Century Vision**

**Regional Investment Strategy** and **Services**

Requirements for **Funded Partners**

Overview of **Single Investment Funding Process**

Review of **Application**

**Funding Timeline** and Additional Resources

Panel for **Questions**

**Thank You** and **Adjourn**

# Commitment to Diversity, Equity, Inclusion and Belonging



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.

# Second Century Vision

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.

# More on Second Century Vision

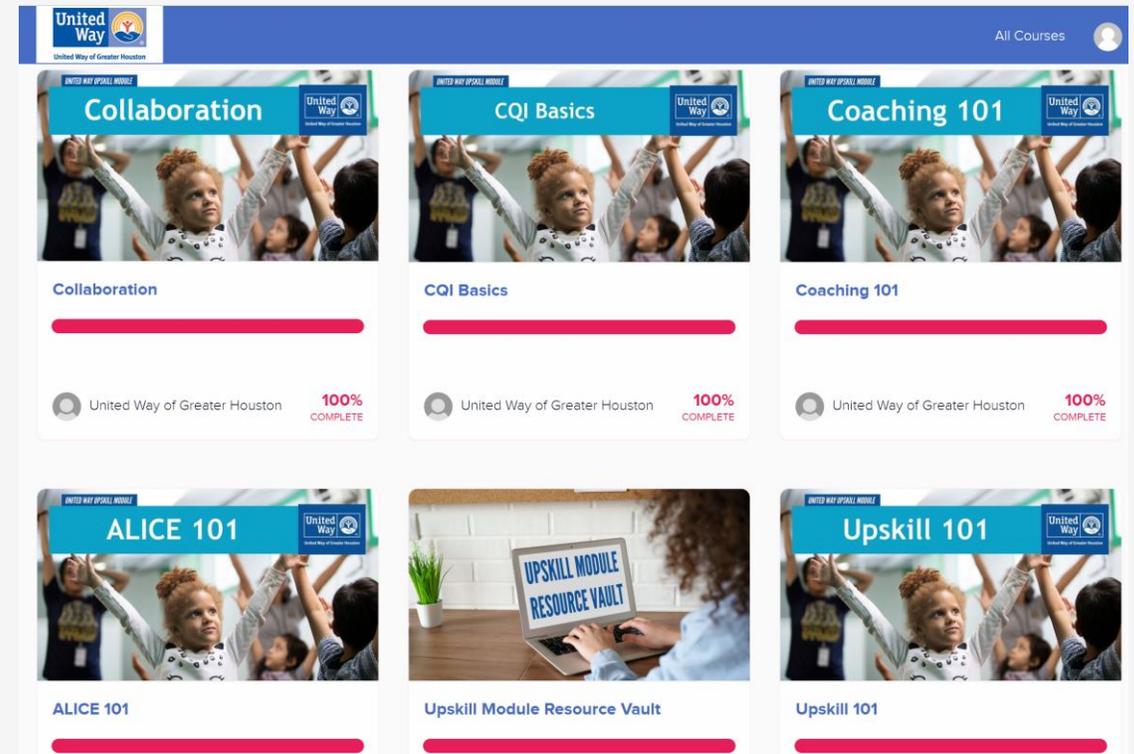
## UWGH's Second Century Vision Webpage

[www.unitedwayhouston.org/scv](http://www.unitedwayhouston.org/scv)



The screenshot shows the top navigation bar with links for ABOUT, JOB BANK, NEWS, NONPROFIT CONNECTION, and NEED HELP?, along with a search bar. Below this is a secondary navigation bar with links for SECOND CENTURY VISION, OUR WORK, MATERIALS, DONORS, and a prominent DONATE button. The main content area features a large banner with the text "SECOND CENTURY VISION" and "DO SOMETHING ABOUT IT" overlaid on a collage of photos showing diverse people. A "DONATE" button is located at the bottom right of the banner area.

## Upskill Modules via Teachable Platform



The screenshot displays a grid of course cards on the Teachable platform. Each card represents a completed module, showing the course title, a progress bar at 100%, and the United Way of Greater Houston logo. The modules shown are:

- Collaboration
- CQI Basics
- Coaching 101
- ALICE 101
- Upskill Module Resource Vault
- Upskill 101

# 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

# Integrated Approach and Coaching Framework

## Three areas of focus ...

- 1 Right agency expertise connected



- 2 Integrated coaching and client support

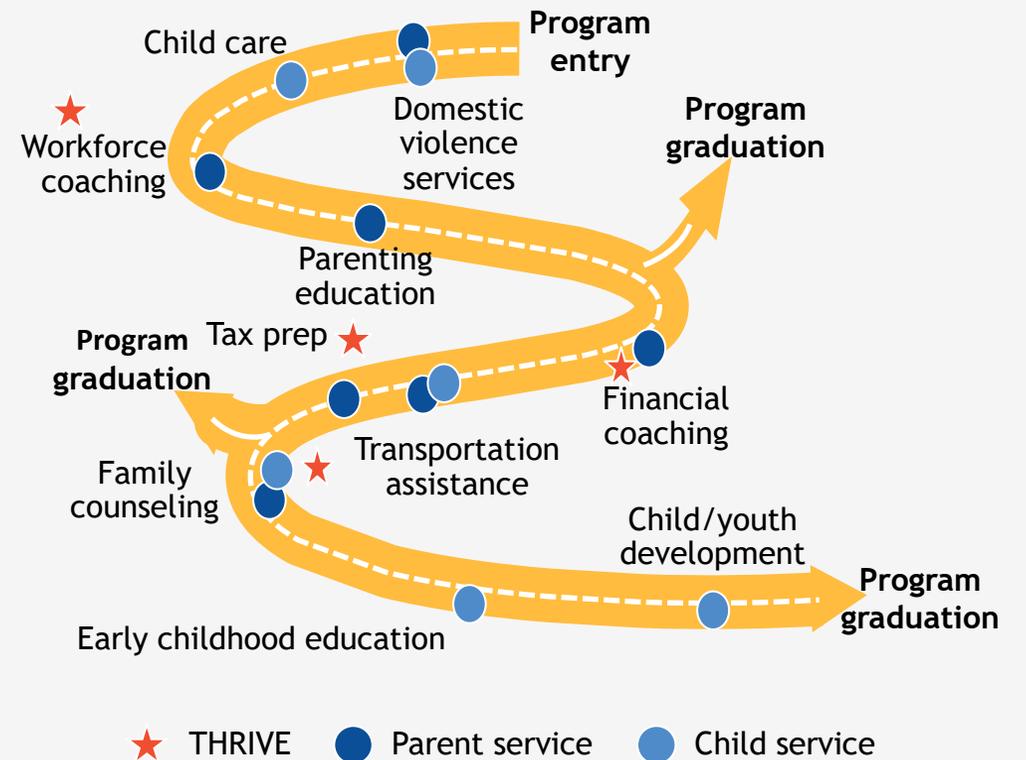


- 3 Client journey tool and resource map



## ... to create an integrated client journey

### Example Client Journey



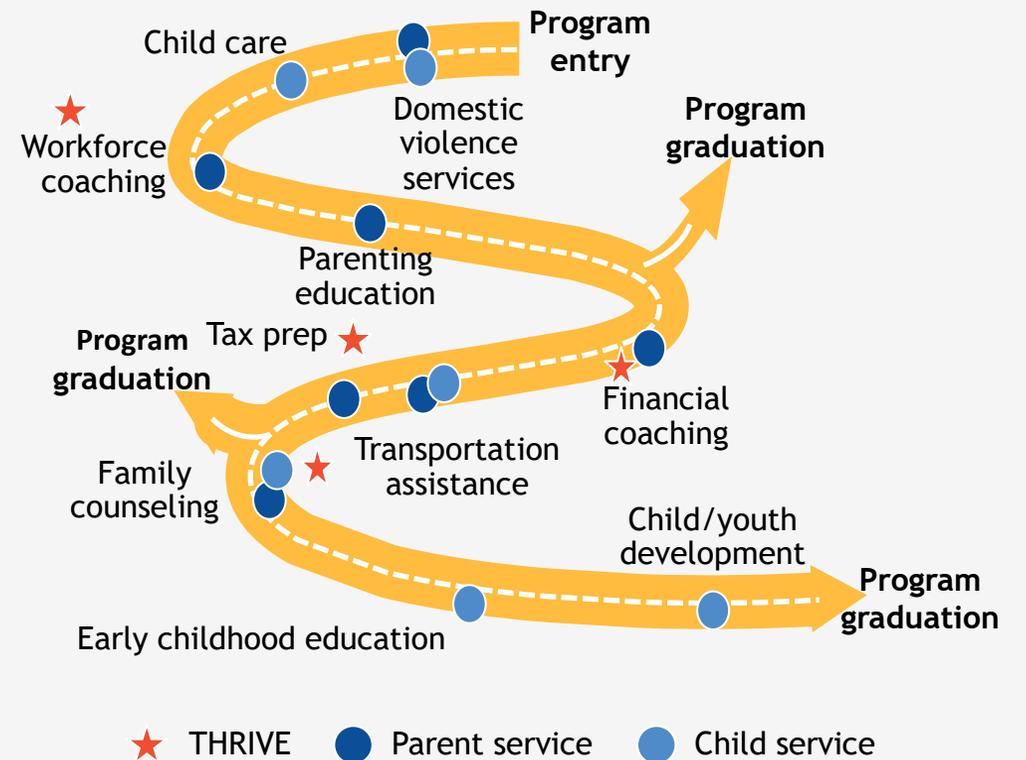
# Regional Investment Strategy and Services

## 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

### Example Client Journey



# Services along Integrated Client Journey



Integrated Client Journey	
Safety Net Programming	Integrated Programming
<p><b>Basic Needs:</b></p> <ul style="list-style-type: none"> <li>Services such as rent/mortgage assistance, utility assistance, technology access, food, shelter, and transportation assistance</li> </ul> <p><b>Freedom from Violence:</b></p> <ul style="list-style-type: none"> <li>Immediate, short-term services focused on safety for those fleeing domestic violence, human trafficking, or vulnerable populations such as refugees.</li> </ul>	<p><b>Financial Stability Programs:</b></p> <ul style="list-style-type: none"> <li>Vocational training and employment coaching;</li> <li>Financial Coaching and Training; and</li> <li>Safe, affordable financial products and services</li> </ul> <p><b>Early Childhood and Youth Development Programs:</b></p> <ul style="list-style-type: none"> <li>Early childhood education/child care;</li> <li>Out of school time programming;</li> <li>College and career readiness programming; and</li> <li>Parent engagement</li> </ul> <p><b>Health Care Programs:</b></p> <ul style="list-style-type: none"> <li>Primary and specialty health care services; and</li> <li>Behavioral health care services</li> </ul>
<p><b>Navigators within Integrated Client Journey</b></p>	

# 13 Priority Regions

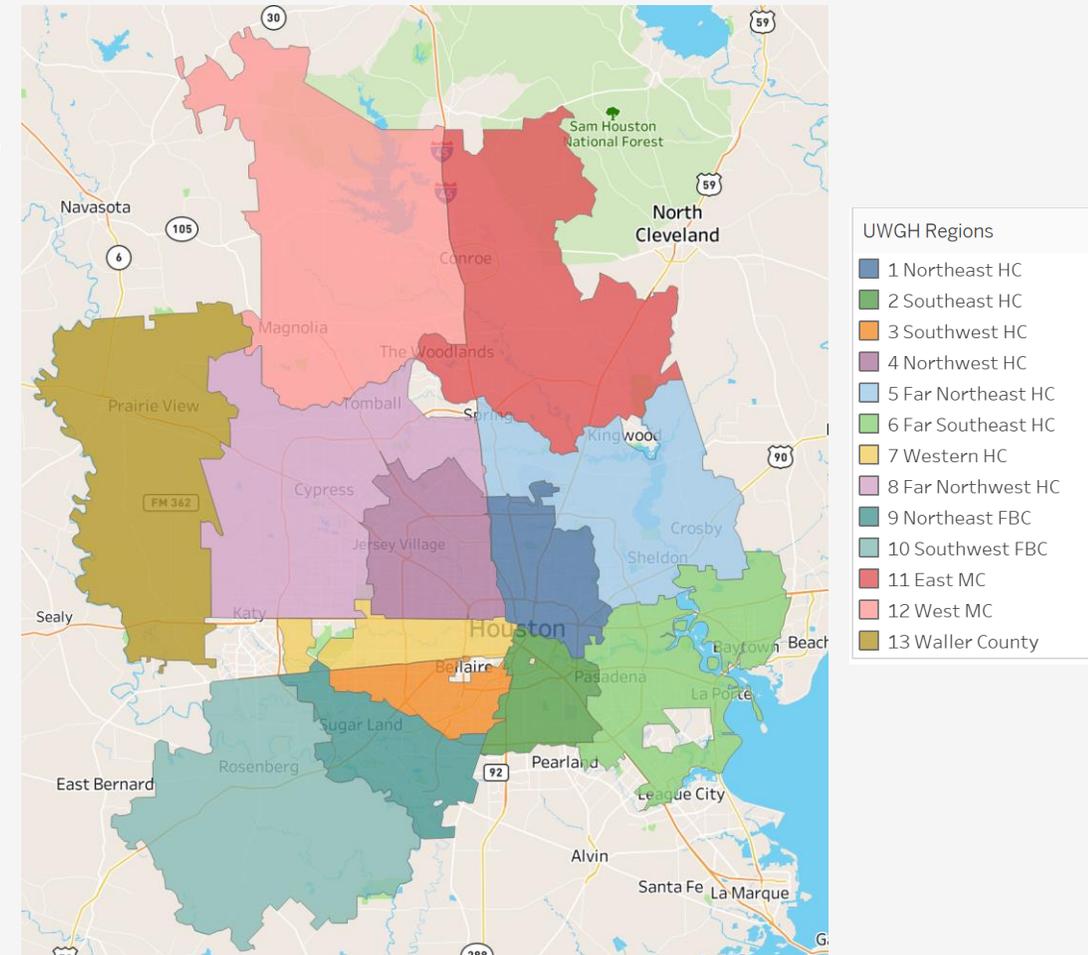
## Regions were identified based on:

- 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

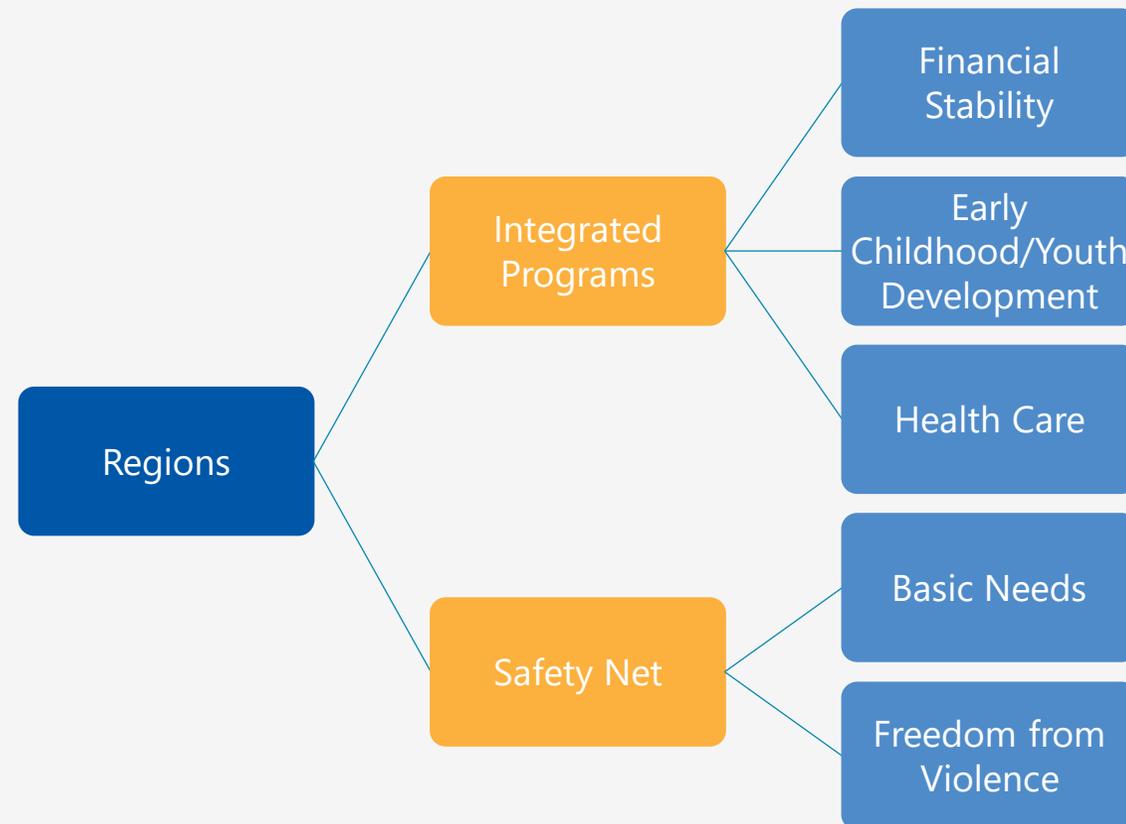
When you give to United Way, you get a multiplier on your investment. You are part of a collective effort that improves people's lives and creates long-term change in our community.

# 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



# Funding Request Guidance

## **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**

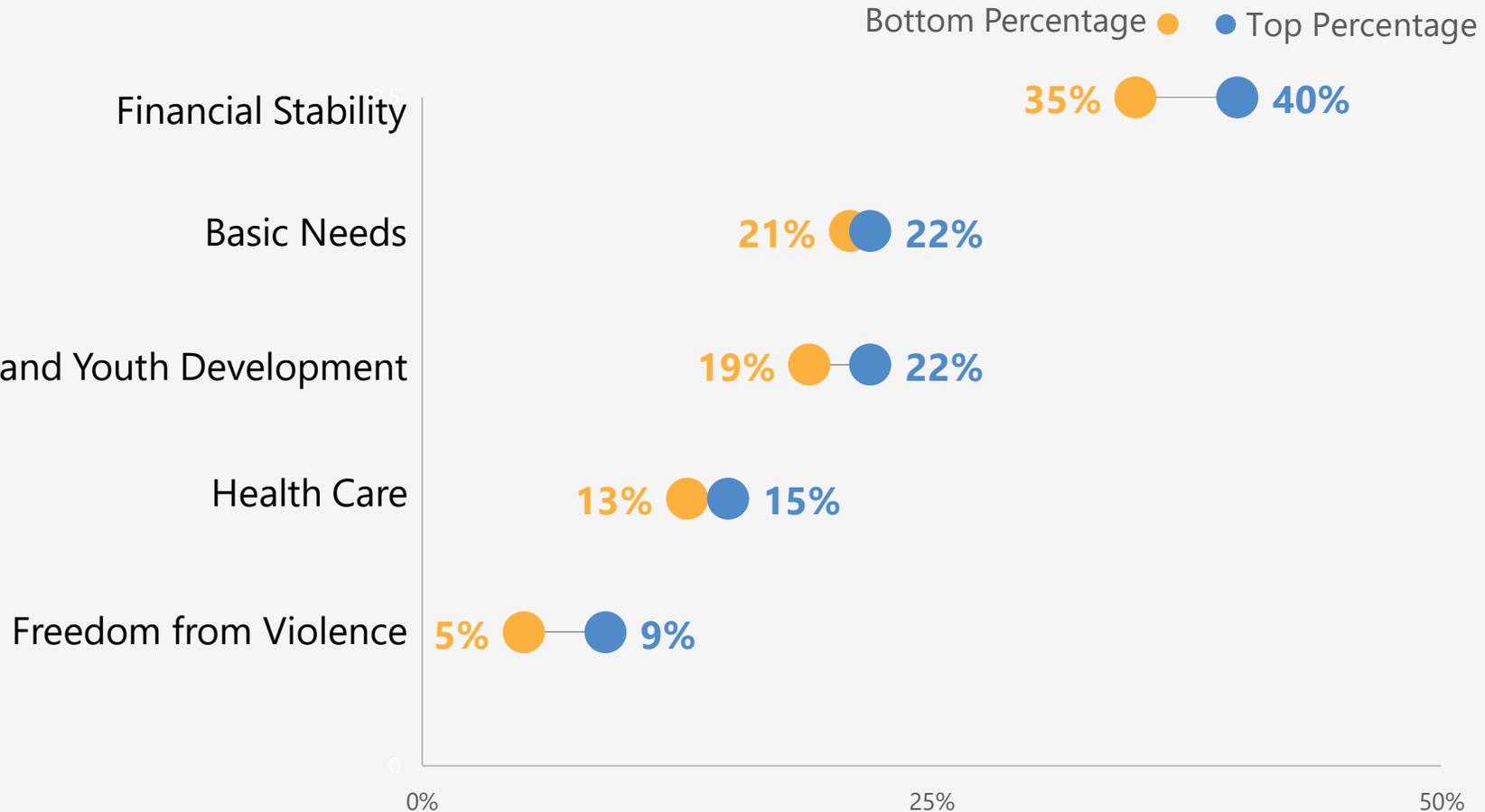
- Impact should match funding request
- Request must be intentional, not a dream list

**\$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**



# Requirements for Funded Partners

## 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

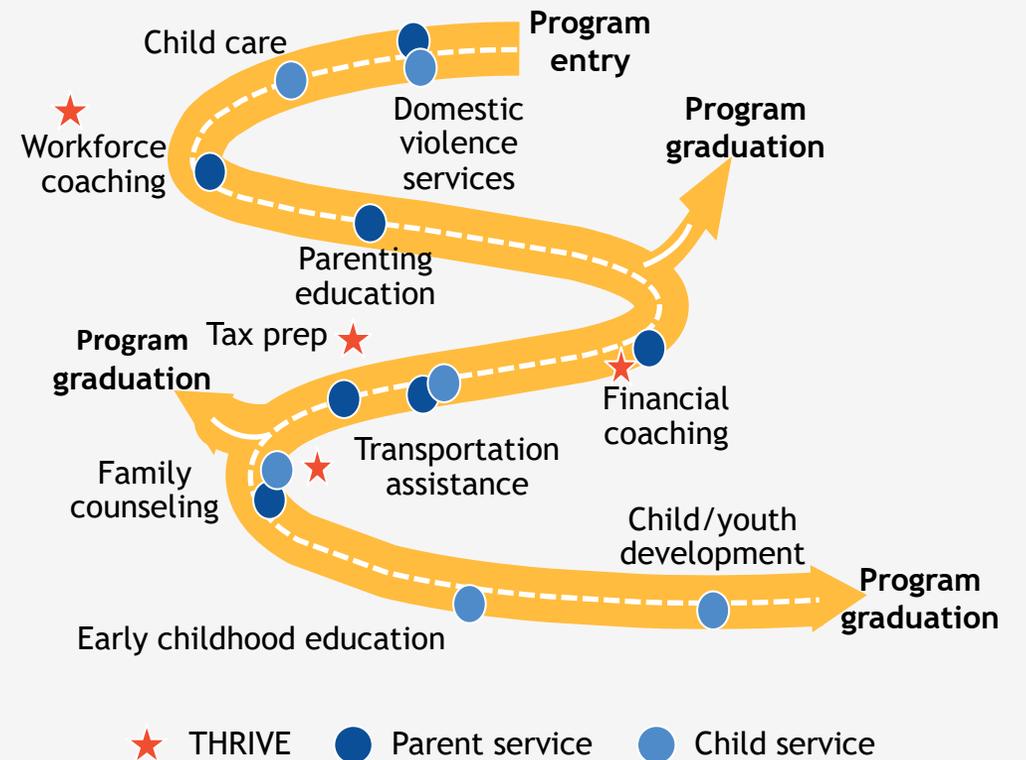


- 3 Client journey tool and resource map



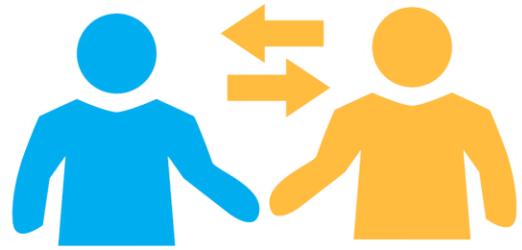
## ... to create an integrated client journey

### Example Client Journey

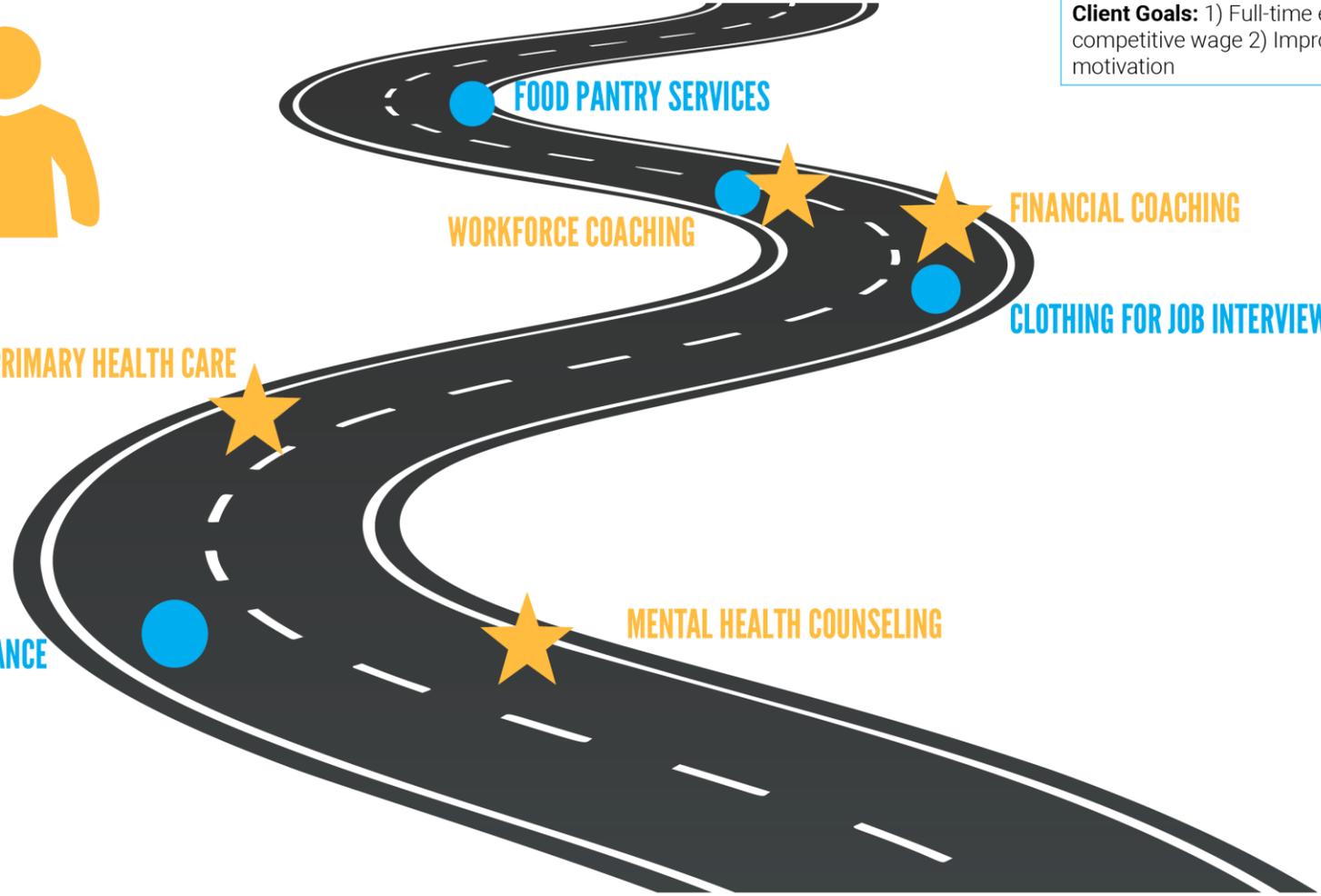


# INTEGRATED CLIENT JOURNEY

## PROGRAM ENTRY



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



## PROGRAM GRADUATION

 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?

- |  |   |
|--|---|
| <ul style="list-style-type: none"><li>• Less than \$12,500</li><li>• \$12,501 to \$25,000</li><li>• \$25,001 to \$37,500</li><li>• \$37,501 to \$50,000</li><li>• \$50,001 to \$62,500</li></ul> | <ul style="list-style-type: none"><li>• \$62,501 to \$75,000</li><li>• \$75,501 to \$100,000</li><li>• \$100,001 to \$150,000</li><li>• More than \$150,000</li></ul> |
|--|---|

# Collaboration, Collaboration, Collaboration

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



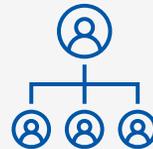
Efficiency and Effectiveness



Integrated Client Journey



Population Served



Leadership Commitment and Buy-In



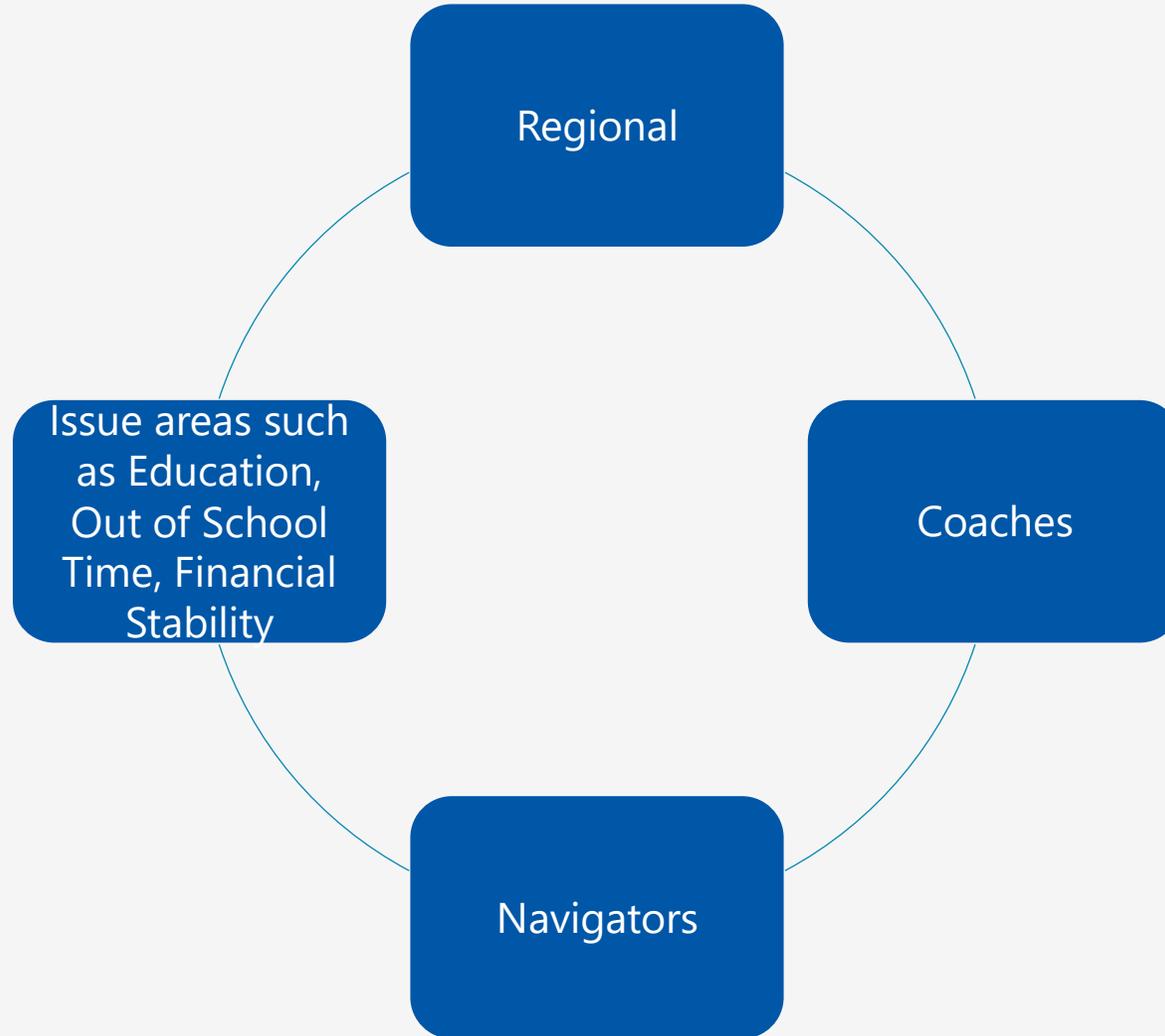
Scale and Innovation



Formalized Agreements



# Peer Learning Communities



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



# 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.**

Purpose & Assumptions  
 ↑ Inputs → Activities  
 ↑ Common Metrics

## Service Performance Metrics

### Financial Stability

- People increase their income
- People increase their savings
- People are primed to acquire assets

### Early Childhood & Youth Development

- Kids demonstrate school readiness
- Youth demonstrate college/career readiness
- Parents agree that an Out-of-School-Time opportunity helps them stay focused and maintain employment

### Health Care

- People engage with healthcare
- People have a medical home
- People improve their behavioral health well-being

### Freedom from Violence

- People increase their safety

### Basic Needs

- People meet their basic needs

## Integrated Client Journey Metrics

Foster and support **coordination** between agencies in the Journey to ensure services are **accessible to clients** in a timely manner.

Support the creation of **trusted data sharing practices** within the Journey.

Support partners and programs in being **versatile** in order to meet community needs in real-time.

Support agency partners in creating a journey experience that is **client driven, accessible, and personally successful.**

- Services and navigation along Integrated Client Journey
- Tracking and measuring data along Integrated Client Journey
- Leading convening and collaboration among partners

- Information and referral from 211 Texas/United Way Helpline
- Single investment funding process
- Ongoing stewardship

- Households with annual income between \$0 and the ALICE survival budget
- Partners (nonprofit, government, etc.)
- Community volunteers and stakeholders

- Annual Community Campaign (funding)
- 4-county service area (13 priority regions)
- Data governance and technology

- Application, evaluation, e-Cimpact for funding process
- Upskill trainings and modules
- UWGH staff

### 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

## Standards and Policies:

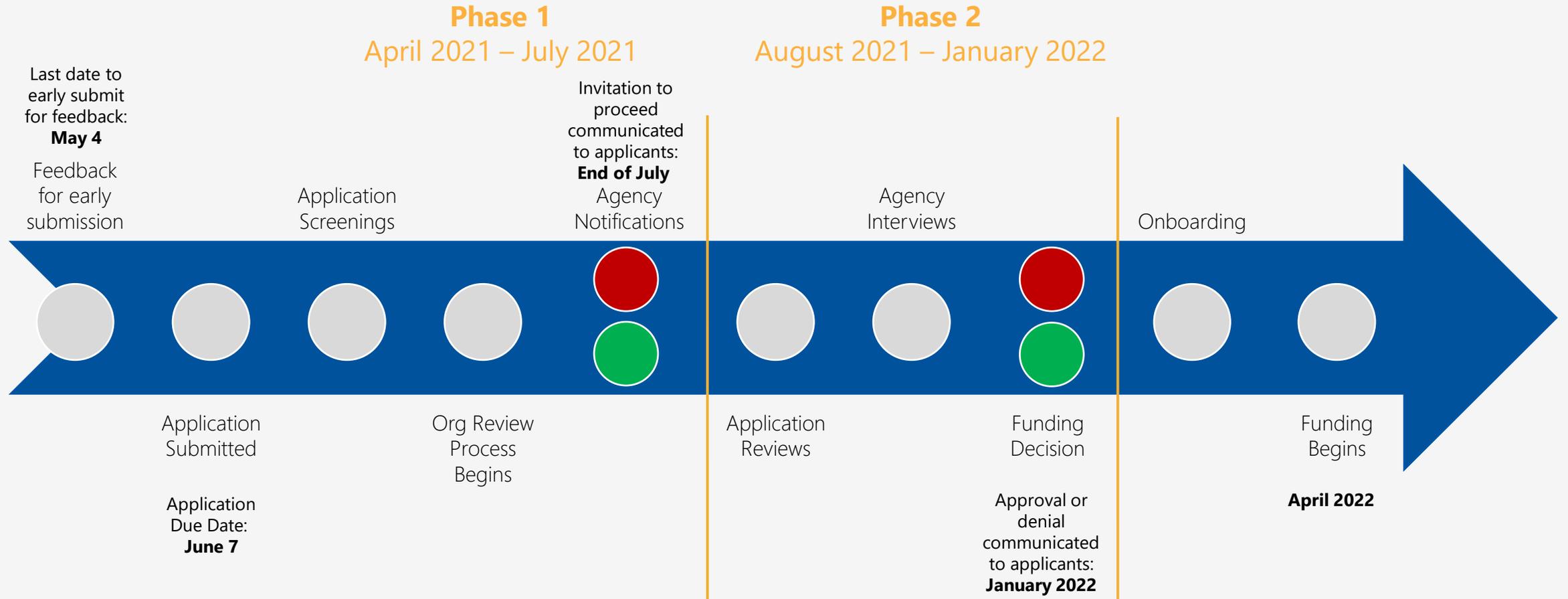
- Outlines what it means to be a funded partner with UWGH
- If funded, will need to agree to Standards and Policies
- Available to view on UWGH's Second Century Vision Webpage after funding conference

# 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

# Application Process



**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!**

Component	Sections
Organizational Review	<ul style="list-style-type: none"> <li>• Agency Budget</li> <li>• Questions &amp; Upload Links for Governance &amp; Financial Health</li> </ul>
Application Questions	<ul style="list-style-type: none"> <li>• Agency                             <ul style="list-style-type: none"> <li>○ Diversity, Equity, Inclusion, &amp; Belonging (DEIB)</li> <li>○ Integrated Client Journey Scenarios</li> <li>○ Continuous Quality Improvement (CQI) &amp; Measuring Common Metrics</li> <li>○ Ongoing Capacity Efforts to Serve ALICE &amp; BIPOC</li> </ul> </li> <li>• Region                             <ul style="list-style-type: none"> <li>○ Region(s) Intending to Serve</li> <li>○ Services Intending to Offer in Region</li> <li>○ Presence in Region</li> <li>○ Program Capacity</li> <li>○ Funding Amount Request &amp; Budget</li> <li>○ Navigation Team Questions &amp; Budget, if applicable</li> </ul> </li> </ul>

# Navigators



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**

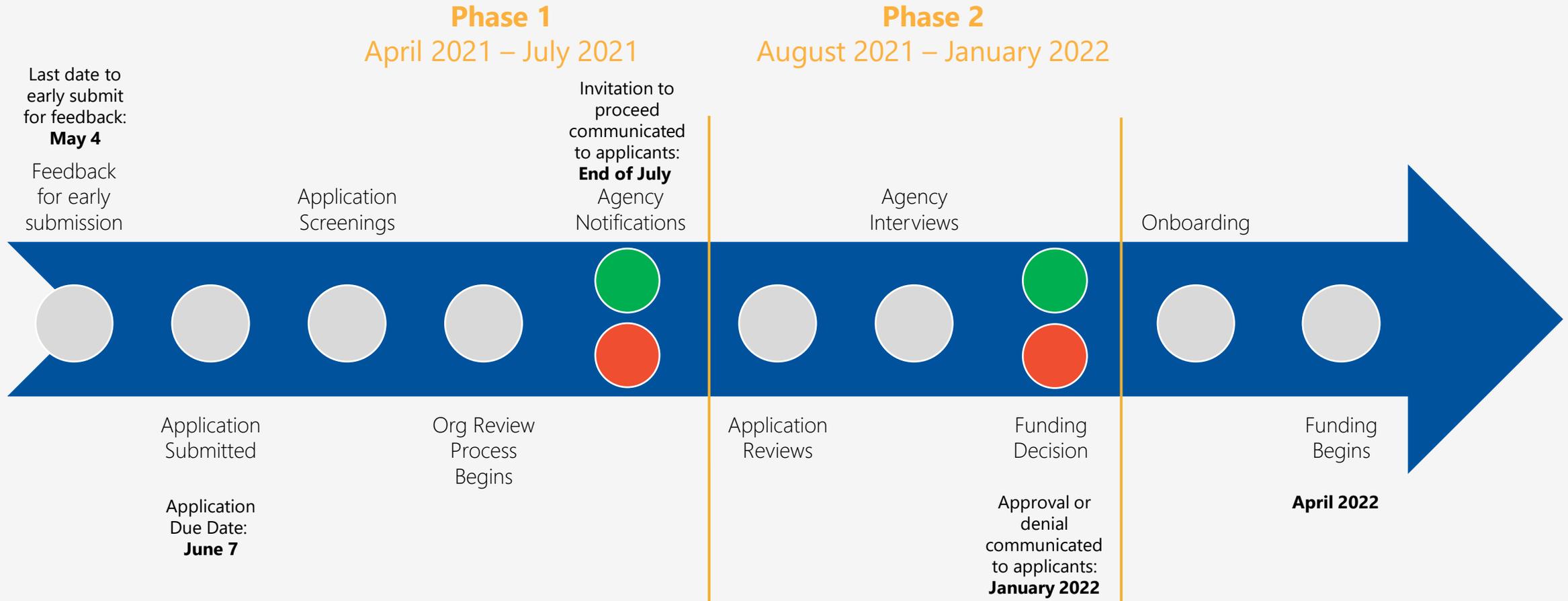
# Navigation Team Application

## 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



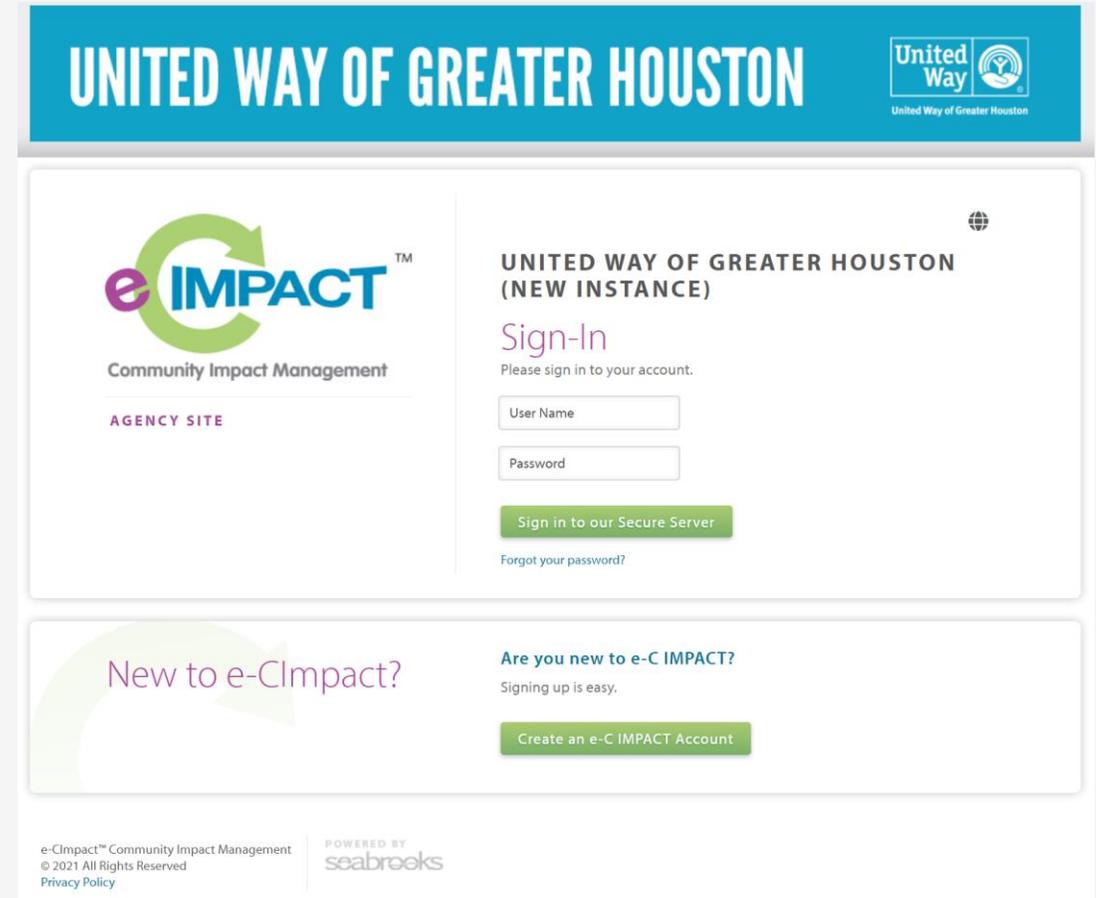
**Applications screened, reviewed and interviews facilitated by community volunteers and UWGH cross-functional staff team**

# New e-Cimpact Portal

**Link to NEW instance for e-Cimpact Portal:** <https://agency.e-cimpact.com/login.aspx?org=UWGH>

**ALL agencies will need to create a new agency profile**

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



**UNITED WAY OF GREATER HOUSTON**

United Way  
United Way of Greater Houston

**e IMPACT™**  
Community Impact Management  
AGENCY SITE

**UNITED WAY OF GREATER HOUSTON  
(NEW INSTANCE)**

**Sign-In**  
Please sign in to your account.

User Name  
Password

Sign in to our Secure Server

Forgot your password?

**New to e-C Impact?**

**Are you new to e-C IMPACT?**  
Signing up is easy.

Create an e-C IMPACT Account

e-Cimpact™ Community Impact Management  
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seabrooks

# Funding Timeline



*This is an estimated timeline that is subject to change*

# Additional Resources

Technical Assistance	NPC Trainings	Additional Resources
<p><b>Technical Assistance Calls</b></p> <ul style="list-style-type: none"> <li>• Wednesday, April 14, 2021 from 9:00 – 10:00 am</li> <li>• Thursday, April 22, 2021 from 3:00 – 4:00 pm</li> <li>• Tuesday, April 27, 2021 from 12:00 – 1:00 pm</li> <li>• Tuesday, May 4, 2021 from 1:00 – 2:00 pm</li> <li>• Wednesday, May 12, 2021 from 9:00 – 10:00 am</li> </ul>	<p><b>Grant Writing Refresher by Nonprofit Connection (NPC)</b></p> <ul style="list-style-type: none"> <li>• Thursday, April 22, 2021 from 11:30 – 1:00 pm</li> <li>• Thursday, April 29, 2021 from 9:00 – 10:30 am</li> </ul>	<p><b>UWGH’s Second Century Vision Webpage</b> <a href="http://www.unitedwayhouston.org/scv">www.unitedwayhouston.org/scv</a></p> <ul style="list-style-type: none"> <li>• Training and Upskill Modules</li> <li>• More information on ALICE</li> <li>• Funding Announcement</li> <li>• Slide Deck &amp; Recording of Funding Conference</li> <li>• Application &amp; link to e-Cimpact</li> <li>• Frequently Asked Questions (FAQs) and Glossary of Terms</li> <li>• Interactive Regional Profiles Dashboard</li> <li>• Comprehensive list of eligible services</li> <li>• List of Common Metrics</li> <li>• Standards and Policies</li> <li>• Registration links for Technical Assistance Calls &amp; NPC Trainings</li> </ul>

# 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

