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## United Way of Greater Houston Single Investment Process Funding Announcement

United Way of Greater Houston (UWGH) invites all eligible nonprofit social service organizations to apply for three-year funding, so that together, we can help individuals and families struggling to make ends meet land on their feet-and stay there.

### HIGHLIGHTS

- Funded partners must provide one or more of the following program areas within the Integrated Client Journey (ICJ):
  - Safety Net Programs – basic need and short-term crisis services
  - Integrated Programs – financial stability, early childhood and youth development, health care, and/or legal services
- Funded partners must provide services to residents and have a presence in one or more of the 12 priority regions across Fort Bend, Harris, Montgomery, and Waller counties.
- Important dates:
  - Virtual funding conference to learn about the application details and requirements – February 15, 2024. RSVP for the funding conference by clicking [here](#).
  - Proposal due date – April 18, 2024
  - Funding Announced – December 2024
  - Partner (new and returning) Onboarding – January to March 2025
  - Funding begins – April 1, 2025

### FUNDING ANNOUNCEMENT

For over 100 years, UWGH has brought together diverse partners and approaches to get to the root of complex challenges holding people back. Guided by research and data, UWGH invests in high-quality programs to create the opportunity for individuals and families in the Greater Houston community to thrive. We do this by leading, serving, influencing, and convening the nonprofit social services sector to deliver quality services with exceptional outcomes.

This announcement describes the United Way of Greater Houston's Single Investment Process (SIP), and outlines the details related to the funding opportunity that is open to all eligible nonprofit, social service organizations that [want to partner to implement the Integrated Client Journey \(ICJ\)](#). A description of eligibility requirements, a funding timeline, definitions of terms used in this announcement, and resources to assist in your organization's responses are also included.



## OVERVIEW OF INTEGRATED CLIENT JOURNEY

The Integrated Client Journey (ICJ) allows a client to create their own customized pathway based on their goals and needs. Rather than working separately to address individual needs, programs are orchestrated to make it easy for clients to engage across services as needed, breaking down barriers and helping ensure clients can be successful. Services include financial stability services, early childhood and youth development, health care, and legal services all supported by safety net services that help people take care of their basic and immediate needs like food, shelter, clothing, and other short-term critical needs for individuals experiencing a crisis.

## VALUES OF PARTNERSHIP

UWGH values the work of our partners and the critical role they serve in our community supporting individuals and families experiencing ALICE to create their own journey to become financially stable. We value partners that share the same values and continue to strengthen our community in innovative ways. Within the Integrated Client Journey (ICJ), we value building partnerships with organizations that demonstrate these qualities:

- Committed to Diversity, Equity, Inclusion, and Belonging (DEIB): Actively engages with all four of these components within DEIB and commits to ensuring that all individuals served are being treated fairly and equitably.
- Engagement with the Integrated Client Journey (ICJ): All levels of the organization are committed to actively engaging in the Integrated Client Journey (ICJ) and communicate across the organization to ensure this vision is achieved. UWGH commits to open and transparent communication with its partner organizations.
- Collaborative: Recognizes that one agency can't do it alone and seek to build intentional collaborations across our network. We believe that a community investment goes beyond dollars granted; we invest in partnerships of shared success and shared learning.
- Coaching mindset: Views clients as the experts in their own lives and as naturally creative, resourceful and whole. Takes a strengths-based approach to serving individuals and families across the entire organization.
- Continuous Quality Improvement (CQI): Utilizes data to make programmatic improvements and changes. Committed to tracking data and reporting outcomes. UWGH will provide support to organizations who may not have robust data systems in place but seek partners that are willing to commit to improving systems and engaging in learning opportunities.

Our aim within the Integrated Client Journey (ICJ) is for individuals and families experiencing ALICE and living below the federal poverty level to attain a sustainable quality of living by accessing and engaging in the program of the Integrated Client Journey (ICJ) including financial stability, early child and youth development, behavioral health, health care, legal services, and safety net services to meet their goals. You can access the United Way of Greater Houston's ALICE reports and data webpage [by clicking here](#).



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We seek to partner with nonprofit, social service organizations that have a physical presence in and provide services to residents in one or more of 12 priority regions within Fort Bend, Harris, Montgomery, and Waller counties. [Please click here](#) to view the searchable database of priority regions by ZIP code.

### **SINGLE INVESTMENT PROCESS (SIP) FUNDING OPPORTUNITY**

United Way of Greater Houston (UWGH) invites all eligible nonprofit social service organizations to apply for three-year funding, so that together, we can help individuals and families struggling to make ends meet land on their feet-and stay there.

We will fund programs and services of the Integrated Client Journey (ICJ). All terms are defined in the [Definitions](#) section of this document. **Funding will be awarded for up to a three-year commitment and is subject to performance and available revenue annually throughout the three-year funding cycle.**

#### **To be eligible to secure funding from UWGH, organizations must:**

- Have its 501(c)3 designation for a minimum of 3 years.
- Have a minimum of three board members who represent the local community.
- Have general liability, directors', and officers' liability, as well as any insurances specific to the services provided.
- Provide program and service areas of the Integrated Client Journey (ICJ) (definitions for these funding categories appear in the [Definitions](#) section).
- Have an established presence in and provide services to the region or regions where funding is requested.
- Align with UWGH's values in partnership including:
  - Committed to Diversity Equity Inclusion Belonging (DEIB)
  - Engagement with the Integrated Client Journey (ICJ)
  - Collaborative
  - Coaching mindset
  - Continuous Quality Improvement
- Meet Organizational Review requirements including an independent financial audit conducted by a certified professional accounting firm if expenditures are greater than \$1 million in the last fiscal year. If expenditures are less than \$1 million in the last fiscal year, organizations are required to have an independent financial statement review conducted by a certified public accountant.



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**If funding is awarded to your organization, you must agree to:**

- Serve individuals and families who are experiencing ALICE or living below the federal poverty level.
- Collaborate and engage with nonprofit, social service organizations convened for the Integrated Client Journey (ICJ) by the UWGH.
- Engage as an active partner within the ICJ by recommending individuals to work with a navigator and accepting referrals from navigators for funded programs and services. (definitions for these funding categories appear in the [Definitions](#) section).
- Participate in the ICJ data collaboration efforts by accepting referrals and sharing data with collaborating organizations through the ICJ Technology Tool. Treat the data with the highest level of confidentiality and security.
- Participate in Agency Partner Collaborative convenings with the purpose of sharing successes, challenges, and documenting best practices.
- To bolster engagement and optimize collaboration across the ICJ:
  - If funded in Financial Stability service area, participate in THRIVE collaborative convenings and coaching networks.
  - If funded in Youth Development service area, participate in Out 2 Learn (O2L) meetings and quality improvement process known as Youth Program Quality Intervention (YPQI).
- Submit timely program and financial quarterly reports to the UWGH including measuring common metrics of the Integrated Client Journey (ICJ) (definitions for common metrics appear in the [Definitions](#) section).
- Adhere to UWGH Standards and Policies for funded partners. The Standards and Policies are available by [clicking here](#).

**If funding is awarded to your organization, the benefits of partnering with United Way of Greater Houston include:**

- Results-based flexible funding.
- Funding can be used as match for other funding opportunities.
- Opportunities for capacity building including ongoing technical assistance, training, and on-site support throughout the funded period.
- Co-branding opportunities.

In the 2024 Single Investment Process, the application for agencies applying to house a Navigation Team is by invitation only. This decision was made to ensure consistency across the network as UWGH spent considerable time onboarding and training the network in 2021 and 2022. Future invitations to participate as a Navigation agency will be dependent on data, gaps in service areas and performance.



## FUNDING TIMELINE

Funding Announcement	January 24, 2024
Funding Conference	February 15, 2024
Technical Assistance Calls	February – April 2024
Application Due	April 18, 2024
Meetings with Select Agencies Applicant	Summer & Fall 2024
Funding Notification	December 2024
Partner (new and returning) onboarding	January – March 2025
Funding Begins	April 1, 2025

## RESOURCES

### Definitions

Agency Partner Collaborative (APC) – A professional learning community to foster collaborative learning among colleagues, including sharing best practices, collective problem solving, and improving program quality and outcomes to support the Integrated Client Journey. The meetings are held quarterly. All funded partners are expected to attend and engage in the convenings. The APC convenings are held at the regional level.

ALICE – Asset Limited, Income Constrained, Employed. Represents those who are working and above the federal poverty line but struggle to afford the basic necessities of housing, food, child care, health care, and transportation. For in depth information about the ALICE data, including information about the ALICE survival budget, [please click here](#).

Coaching Framework – A coaching framework is a strengths-based, shared belief at every level of your organization that your clients are experts in their own lives; that they possess the necessary skills and resources to achieve their goals; and that they have the solutions to their own challenges. A coaching framework supports the view that all clients are creative, resourceful, and whole.

Collaboration – Collaboration refers to a group of organizations with a common interest who agree to work together toward a common goal, share best practices and resources, develop common goals, and engage in collective problem solving.

Common Metrics Structure – The common metrics structure will allow UWGH to evaluate change and outcomes over time. Includes two categories of metrics:

1. Service metrics – data that measures the success of a particular safety net or integrated service. Comprised of outputs, indicators and targets that are directly connected to services delivered to your clients.
2. ICJ metrics – data that measures client progress along the integrated journey.



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Continuous Quality Improvement (CQI) – The systematic use of data to improve the effectiveness of your programs and services and to communicate their value.

Diversity, Equity, Inclusion, and Belonging (DEIB) – To learn more about United Way of Greater Houston’s commitment to DEIB, click [here](#).

Funding Conference – Interested organizations convene to learn the details and requirements associated with UWGH’s Single Investment Process (SIP) for potential partnership and funding.

Integrated Client Journey (ICJ) – A client-driven and personalized approach to service delivery. Rather than working in parallel, programs work collaboratively to allow the client to engage across services, as needed. Using their unique strengths, each client creates a journey designed to achieve their goal(s). Some journeys can include a navigator who engages with clients to help them articulate their goals and connect to the services needed to achieve them, as well as versatile integrated and safety net programs who collaborate and share data so that clients can enter services at any point. A client on “the journey” is defined by either a. working with a navigator of the ICJ or B. receiving two or more integrated and/or safety net services.

Integrated Programs – Integrated programs include financial stability services that are supported by early childhood, youth development, health, behavioral health care, and legal services. Financial Stability programs such as vocational training, employment coaching, and financial coaching; Early Childhood and Youth Development programs such as child care, out of school time, and college and career readiness services; Health Care programs such as behavioral and primary health care; and legal service to support, but not limited to eviction process/representation, expungement, family law, immigration rights, etc. A comprehensive list of integrated programs and services will be available soon on our [webpage](#).

ICJ Data Collaboration – UWGH is measuring the impact of its investments by collecting, analyzing, and reporting aggregated and disaggregated data that is provided by funded partners through a data governance framework and the ICJ Technology Tool. All funded partners must agree to participate in the ICJ Data Collaboration.

ICJ Data Governance Framework – The legal, technical, and governance framework that allows funded partners to securely share data in real time to support the continuity of care for clients served through the ICJ.

ICJ Technology Tool – A first-of-its kind data-driven, cloud-based system that improves connectivity of data, client needs, tracking of journey, completion of goals, programs, and services among collaborating organizations and UWGH. The tool also has a robust governance framework to provide technical safeguards for data sharing.



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Navigator – A navigator is a professional who uses a relational, strengths-based approach to help clients articulate and achieve their goals.

Organizational Review – UWGH will assess your organizational health through a process called Organizational Review. Your organization’s financial health and governance strength are analyzed as part of the Organizational Review process.

Regional Descriptions – UWGH identified 12 priority regions in Fort Bend, Harris, Montgomery, and Waller counties for our investments. Priority regions were determined using multiple data factors including the density of households experiencing ALICE and living below the federal poverty level, the services or lack of services, and the concentration of black, indigenous, and people of color (BIPOC) in each region. The regional map can be found [here](#).

Safety Net Programs – Safety net programs are foundational, short-term, and help individuals and families face unexpected challenges so they can move from surviving to thriving. These include basic needs services such as rent or utility assistance, food pantries, transportation, etc. and short-term support services for individuals and families experiencing a crisis. A comprehensive list of safety net programs and services will be available soon on our [webpage](#).

Single Investment Process (SIP) – United Way’s open process for potential partnership and funding.

Strengths Based Approach – An approach to services that focuses on a clients’ strengths or assets, instead of their weaknesses or deficits, even during times of crisis.

Sustainable Quality of Living – Sustainable quality of living is defined as an individual or family’s financial stability and therefore, the ability to maintain their dignity and independence.

Volunteer Oversight – Volunteers who represent various geographical regions where UWGH will fund are an important asset to the funding review and stewardship process. Volunteers oversee the investments made by UWGH.

## **Online Resources**

United Way of Greater Houston Website – [www.unitedwayhouston.org](http://www.unitedwayhouston.org)

Single Investment Process (SIP) Webpage – <https://unitedwayhouston.org/for-nonprofits/how-we-invest/>

Regional ZIP Code Directory Dashboard – <https://unitedwayhouston.org/for-nonprofits/how-we-invest/>

ALICE Webpage – <https://unitedwayhouston.org/what-we-do/employed-but-in-need/>