



connecting people to possibility



United Way of Greater Houston Service Details and Definitions Version 1, Date February 2024

For the 2024 Single Investment Process (SIP), United Way of Greater Houston (UWGH) is shifting our focus to the types of programs you provide that benefit your clients. We aim to invest in building capacity in human-centered programming along the Integrated Client Journey (ICJ) versus population-centered programming. Instead of applying for funding based on the population you serve, consider applying for the types of programs you provide that benefit your clients.

UWGH has invested in the **Integrated Client Journey (ICJ)** to allow clients 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. Funded partners provide programs that address clients' varying needs as they move through their journey.

Individuals and families are most successful when they receive **bundled services** to help them achieve their goals and address needs. Bundled services are services from program areas of the ICJ that when combined help ensure that an unaddressed issue does not undermine a family's success. Bundling also eases the family's access to services, often eliminating barriers like time and transportation. By providing families with bundled services and access to multiple services, we can increase their likelihood of achieving financial stability. We recognize that not every agency will have the resources to provide every service a family need by themselves. This is why we highly encourage collaboration with partner agencies to provide bundled services that span programs and services of the ICJ as needed. We suggest agencies highlight their ability to deliver a bundled model to clients in their funding requests.

UWGH focuses on serving individuals and families experiencing ALICE and living below the Federal Poverty Level (FPL). ALICE (Asset Limited, Income Constrained, Employed) represents those who are working but struggle to afford the basic necessities of housing, food, childcare, health care, and transportation.

The Integrated Client Journey (ICJ) is comprised of the following program categories:

- **Integrated Services**
 - Financial Stability
 - Early Childhood and Youth Development
 - Health Care
 - Legal Services
- **Safety Net Services**
 - Basic Needs and Short-Term Crisis Services

This document, though not exhaustive, provides examples of the types of services United Way may choose to invest in as part of its Single Investment Process.

Integrated Services

Programs that collaborate within a coaching framework to address multi-layered goals for the individual and whole family to achieve financial stability. Integrated services are organized into Financial Stability, Early Childhood and Youth Development, Health Care and Legal.

The following services are classified under the **Integrated Services** investment category.

Financial Stability programs are critical to helping ALICE earn sufficient income, develop responsible financial habits, meet regular expenses, and set aside funds for emergencies and future goals.

Services	Definition
Income Supports	This is typically done through a Coach who works 1:1 with a client to ensure they are receiving all potential public benefits (i.e., SNAP, WIC, TANF, Medicaid etc.) or resources. This should be done in an integrated approach bridging basic needs assistance to longer-term services such as employment coaching or financial coaching. This differs from a standalone basic need service and is part of a more intentional, embedded connection between these longer-term services.
Adult Education	Services or instruction below the postsecondary level for individuals: a. who have attained 16 years of age; b. who are not enrolled or required to be enrolled in secondary school under state law; and c. who either: <ul style="list-style-type: none">• Lack sufficient mastery of basic educational skills to enable the individual's ability to function effectively in society;• Do not have a secondary school diploma or its recognized equivalent and have not achieved an equivalent level of education; or• Are unable to speak, read, or write the English language.
Computer Based /Digital Skills Training	Training courses that prepare adults with the ability to use computers, applications and related technology efficiently and effectively enough to understand how computers work and operate to obtain employment and/or complete a training program.
Bridge Programs	Bridge programs are classes that should be heavily informed by employer partners and includes industry relevant math/reading and English remediation, fast "track" to prepare for technical training. They may also include soft skills or executive skills training (communication, conflict resolution), or job-search skills (resume writing, etc.) These programs should be embedded within an integrated service delivery approach.
Job Readiness	A class that offers clients an opportunity to develop job skills, including making a resume, developing an elevator pitch, soft-skills or executive skills development, connection to computer-based/digital skills training, or researching jobs. (Goal is skill development).
Vocational Training	A class that offers clients an opportunity to develop skills related to a specific job. These can be classes offered at the agency, through community colleges or private institutions. A client is counted as completing vocational training only when they have successfully completed all components of the training. Must lead to receipt of an industry recognized certificate.

Employment/ Career Coaching	A participant works 1:1 or in a group setting with a Coach to obtain a job based on the client's career goals. An employment coach maintains the coaching approach and a strengths-based approach. An Employment Coach may perform certain activities in a session such as: assisted career exploration, skills/aptitude assessments, resume review, mock interviewing, etc.
Workforce Supports Services	Services provided that support clients in their ability to acquire or retain employment. These supports may include, but are not limited to, work-related expenses such as work attire/uniforms, boots, tools and transportation assistance.
Financial Education	Classes or courses that are focused on either knowledge or skill building in relation to finances. The class might offer an overview of key financial stability issues, including budgeting, credit, and debt, improving client's financial capability. It is strongly recommended that this sub-category (Financial Education) be paired with financial coaching to support in achieving financial stability and reaching financial goals.
Financial Products	Financial products may range from matched savings such as (but not limited to) Individual Development Accounts (IDA), tax preparation, credit building, or small dollar loan products that are safe and affordable and support an individual in reaching financial stability.
Financial Coaching	This can be conducted either in a 1:1 setting or in a group setting and is a client driven approach to helping individuals reach their financial goals. Coaches facilitate behavioral change and do not provide advice, rather they use goal setting, action planning and powerful questions to support an individual.
Small business/ Entrepreneurship Supports	Services under this category may include 1:1 business coaching, business mentorship, or classes that support an entrepreneur in either launching or sustaining a business based on the client's entrepreneurship goals. Services may provide foundational knowledge such as (but not limited to) creation of a business plan, marketing, or business taxes.
Asset Building Supports	This can be conducted either in a 1:1 or a group setting and is a client-driven approach to help individuals build or acquire assets to include, but are not limited to transportation, home ownership, land, stocks, bonds and post-secondary education. Coaches facilitate behavioral change and do not provide advice, rather they use goal setting, action planning and powerful questions to support an individual.

Early Childhood and Youth Development programs are rooted in supporting adult caregivers being able to maintain employment while providing a quality program experience for kids to achieve their full potential.

Early Childhood programs serve two main purposes in helping ALICE achieve stability: workforce stability and preparing kids for school.

Youth Development programs assist youth in grades K-12 that support and encourage social/emotional development, academic success, and exposure to other opportunities.

Services	Definition
Early Childhood Education	Licensed, quality, accessible early childhood programming for children 0 to Pre-K that help meet developmental milestones and reach essential levels of performance needed for school. This is rooted in supporting adult caregivers with financial stability and asset building.
Out-of-School-Time	Services for grades K-12 that occur during non-academic (or school) hours such as before school, after school, weekends, and during school breaks (including summer). Services can include a variety of topics such as enrichment, college or career-based transition programs, youth mentoring, academic support, parent/family engagement and more.
During School Hours or Ancillary Time	Services for grades K-12 that occur during school hours. Services can include a variety of topics such as enrichment, college or career-based transition programs, youth mentoring, academic support, parent/family engagement and more.

Health Care programs help ALICE become or remain able to fully engage in career and life. Services work with ALICE to improve their physical health, prevention care, resolve individual or family mental health issues and substance use disorders. Family can encompass household, extended family, or chosen family unit.

All health care services should have the capacity to accept referrals from United Way Navigators serving clients enrolled in the ICJ.

Services	Definition
Counseling	Services to support an individual or family's mental health and/or substance use disorders through counseling services. Services can be open to children, adolescents, adults, and older adults, and can include individual, family, couple, and group counseling. Services must be delivered or overseen by a licensed professional.
Outpatient Treatment	Outpatient treatment services to support an individual's mental health and/or substance use disorders. Services must be delivered or overseen by a licensed professional.
Recovery Support Services	Recovery support services through peer recovery specialists to increase long-term recovery.
Physical Health Care	Services to identify, intervene and maintain an individual's physical health. Primary care (includes pediatric and women's care) and specialty care services including dental, cardiology, gastroenterology, optometry, audiology, acute, occupational therapy, speech therapy, physical therapy, etc.

Legal programs help ALICE in exercising their constitutional rights.

Services	Definition
Legal	General legal services (including advocacy on behalf of someone else) to support, but not limited to eviction process/representation, expungement, family law, immigration rights, etc.

Safety Net Services

Foundational services that help individuals face unexpected challenges and have the opportunity to thrive.

Basic Needs programs ensure those who need it can meet their temporary, immediate, and life-sustaining needs. These services are critical, especially during transitions from jobs or housing, helping put ALICE on the path toward longer-term stability while covering costs that often keep ALICE from falling into crisis again.

Services	Definition
Emergency Intervention	Emergency interventions that assist clients in next steps on their journey to stability. Including emergency hotline support, hospital accompaniment, establishing a safety plan, etc.
Emergency Shelter and Lodging	Emergency shelter and lodging includes assistance with short-term, temporary housing and hotel stays (up to 30 days).
Rent/Mortgage Assistance	Rent and/or mortgage assistance includes payment to a landlord or mortgage payment, for deposits, back payment due, etc. for continued residential use of property.
Food Assistance	Food assistance includes assistance with purchasing or accessing food.
Utilities Assistance	Utilities assistance includes payment to utilities that supply the community with electricity, gas, internet access, water, or sewage.
Prescription Medical Assistance	Prescription medical assistance include needs that are not met by insurance coverage or uninsured individuals.
Transportation Assistance	Transportation assistance includes travel support to job related; medical, social service appointments including car repairs.
Basic Needs Assistance that coordinates with Navigator	Basic Needs Assistance that coordinates with enrolled clients engaged with a Navigator for financial assistance (rent, utilities, food, transportation, misc.)*

*Basic Needs Assistance for enrolled navigation clients:

United Way seeks to fund additional basic needs services in a variety of categories (rent, utilities, etc.), that would be able to increase their capacity in receiving referrals for Navigation clients to help get their basic needs met. Details:

- Demonstrates proficiency in providing a variety of basic needs service to meet the needs of the general population being served within the Navigation Network
- Willingness to serve clients across all regions
- Ability to build capacity to work collaboratively with Navigation Network
- Willingness to be engaged and responsive to referral process

Navigation Services

The Integrated Client Journey (ICJ) is a client-driven and personalized approach to service delivery and a Navigator is a professional who uses a relational, strengths-based approach in helping clients articulate and achieve their goals. With the help of a Navigator, each client creates a personalized journey that amplifies their unique strengths and is designed to help them achieve their goal(s). The Navigator connects these clients to versatile safety net and integrated services aligned with their goals and agencies who provide these services work collaboratively to allow the client to engage across services, as needed. Agencies will also share data through the ICJ Technology Tool after receiving consent from clients.

The following expectations are set forth for navigation services.

- Navigators provide essential referrals and support to clients as they move through their journey to financial stability. Navigators connect clients to services across the integrated client journey.
- Navigators can be described as empathic, compassionate, nonjudgmental, motivating, and encouraging. They use coaching skills to help clients articulate and achieve their goals.
- Navigators are generalists, not specialists. The Navigator is able to help clients set and achieve their goals, regardless of their presenting needs. Navigators must be able to work with diverse populations. They have the skills to support clients in crisis and resolve conflict. Navigators work alongside an agency's case manager, coach, or counselor.
- Navigators are aware of the strengths and resources of the specific community or region they are serving.
- Navigators will receive extensive training in coaching skills, trauma-informed care, cultural humility, motivational interviewing, cross cultural practices, use of common tools, among other relevant topics.
- Navigators work within a Navigation Team at an agency. The Navigation Team will include the Navigator, who works full time on Navigation duties, as well as staff members who are partially assigned to direct service Navigation duties and supervision, so that the agency can serve clients without interruption if there is staff turnover. Navigators participate in both regional peer learning communities as well as navigator peer learning communities (Navigation Network).

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 we spent considerable time onboarding and training the network in 2021 - 2023. Future invitations to participate as a Navigation agency will be dependent on data, gaps and performance.

Despite this, there are opportunities for your organization to be involved within the Navigation Network beyond your agency's current role as Referral Receivers. Current needs include basic needs services that are looking to build capacity and accept referrals from Navigators. To be considered, organizations, must be engaged and responsive to receiving referrals.

This is the end of the document. Additional details, including updates to this document, can be found at:
<https://unitedwayhouston.org/for-nonprofits/how-we-invest/>