MISSION: United Way Suncoast is committed to providing leadership and programs that improve lives and create lasting change by mobilizing the caring people of our community to give, advocate, and volunteer.

MacKenzie Scott

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United Way Suncoast R.I.S.E. Task Force Report 2021

R.I.S.E. Task Force

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United Way Suncoast

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South Florida State College

Jessica Muroff
United Way Suncoast

Bemetra Simmons
Tampa Bay Partnership

Alex Sink
Community Volunteer

Dan Vigne
Northern Trust

Heather Navartil
United Way Suncoast

MEDIA LINKS

UWS Website-R.I.S.E.
UWS Organizational 3-year Strategic Plan 2021-2024
Gift Award Press Coverage
R.I.S.E. Task Force Community Presentation
R.I.S.E. Press Coverage
ALICE Report
UWS FY21 Audit
FY22 Budget

United Way Suncoast

5 COUNTY MAP

Serving Pinellas, Hillsborough, Manatee, Sarasota, and Desoto
1. How did you use the funds in the past year? How do you plan to use them next year? (High-level percentages are fine, e.g. 20% for X, 50% for Y, and 30% for Z)

Expense Report as of Oct. 31, 2021

United Way Suncoast issued an RFP to manage and house the gift while the organization and task force completed strategic planning. As of this report, UWS employed two consultants: 1) to facilitate the task force to optimize impact and equity of use of the gift into the Suncoast community (The Corley Company) and 2) to audit and recommend improvements to UWS’ Individual Philanthropy fundraising to leverage the gift with other major gift prospects (Bob Carter Companies).

<table>
<thead>
<tr>
<th>Date</th>
<th>Credit</th>
<th>Debit</th>
<th>Vendor</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>December 2020</td>
<td>20,000,000.00</td>
<td></td>
<td></td>
<td>Scott Gift</td>
</tr>
<tr>
<td>March - August 2021</td>
<td>17,500.00</td>
<td></td>
<td>The Corley Company, LLC</td>
<td>Facilitation of Major Gift Task Force</td>
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<tr>
<td>January-December 2021</td>
<td>42,800.00</td>
<td></td>
<td>Bob Carter Companies, LLC</td>
<td>Feasibility Study/Strategy Development to Expand Work</td>
</tr>
<tr>
<td>Remaining Balance</td>
<td>19,939,700.00</td>
<td></td>
<td></td>
<td></td>
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</table>

R.I.S.E Task Force Recommendations

<table>
<thead>
<tr>
<th>Allocation Priorities</th>
<th>Supporting Immediate Needs</th>
<th>Expanding &amp; Deepening Impact</th>
<th>Big &amp; Bold</th>
<th>Innovating</th>
<th>Strengthening &amp; Thrivability of UWS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount</td>
<td>Up to $3 million</td>
<td>Up to $5 million</td>
<td>Up to $7 million</td>
<td>Up to $3 million</td>
<td>Up to $2 million</td>
</tr>
<tr>
<td>Time Period</td>
<td>0 mos - 12 mos</td>
<td>0 - 3 years</td>
<td>0 - 5 years</td>
<td>0 - 5 years</td>
<td>0 - 5 years</td>
</tr>
<tr>
<td>Definition</td>
<td>Current, urgent community</td>
<td>To expand current initiatives across all ZIGSYRXMIWHER to begin using the money to make an immediate impact.</td>
<td>An initiative desperately needed to improve the lives of ALICE families across all ZIGSYRXMIWX7QXIIXLXRM which no other organization MW[MMPRKSWEFPXSHS is a highly visible and highly challenging project.</td>
<td>Criteria will need to be HIZIPSTHX8LM WMYEOTS NIGY with which is innovative and unique.</td>
<td>8LM WEPPS GXMSRIFY WVIW S712XEM PM X</td>
</tr>
<tr>
<td></td>
<td>Eviction Crisis</td>
<td>2SRTVSX X6W SYS VGYIIRXIV</td>
<td>Data for Impact Center, navigation ecosystem research &amp; solution development</td>
<td>To be determined</td>
<td>UWS Infrastructure</td>
</tr>
<tr>
<td>Focus</td>
<td>Early Learning</td>
<td></td>
<td>To be determined</td>
<td>UWS Infrastructure</td>
<td></td>
</tr>
</tbody>
</table>

2. What was the impact of the funds (e.g. on those you serve, on your partners and staff, on your organizational capacity)?

United Way Suncoast's R.I.S.E. Task Force prioritized a portion of the MacKenzie Scott gift for immediate needs, and right now, one of our ZIGSYRXJ EVIEQ SWX TVIWWRMK TVSFQIQW M WIZGXM SBW - RERH 4M RIPPEW IZMGXMR P MRRW LEZIFIIR PARTHOMICXLIWXXEVPX pandemic. In Sarasota, Manatee and DeSoto, data points and anecdotal evidence point toward the numbers growing larger, especially since the Centers for Disease Control ended its eviction moratorium in October.

To address the complex issue, United Way Suncoast will move forward this month with plans to devote $3 million towards the crisis. The eviction HIRRIP ITPER [MPP JSY WW SR EHNVWIVWMK J SYV QEM R EVIEQ EOVX counties:

• ‘VIEHAMKMG SLYXWSJ R5RTVSX XEkKRMIMW
• Providing legal support to tenants facing eviction
• Building awareness about the issue
• Continuing our advocacy efforts.

The initiative will extend our work with Bay Area Legal Services and Gulfcoast 0KEPEVZ3G IWEH RMX SRQS XIKLXLER R5RTVSX XWREHJSYRMXWLRLEZ.

Legal support can help untangle the clog of federal aid relief. While governments in our region have already distributed $40 million in Emergency Rental Assistance (ERA) to address this issue, more than $58 million allocated to ERA sits with the counties and another $790 million sits unused Ex XLIWXSXJLIR9S7GMEP WIEGLHIH SY X5Q YMGRMTEPMX WIXSEWOLS. We could help with the logjam, one of the most consistent responses we heard involved rental navigation. So, much of this funding will go towards hiring rental navigators. Renters in need of assistance routinely have more success meeting the demands of the application process when guided by a rental navigator. Through a partnership with Florida Blue, Bay Area Legal, the University Area CDC and Gulfcoast Legal, UWS already funded a pair of rental navigators and witnessed their success.
3. What were the other byproducts or unexpected consequences of the gift, both positive and negative (e.g. fundraising, recognition, new collaborations/partnerships with other organizations)?

United Way Suncoast had always planned that 2020 would be the year to craft a new strategic vision. No one, of course, anticipated the transformative headwind of a global pandemic, but out of crisis arises opportunity. UWS’ called upon the organization’s focus and agility, and with the help of an engaged board, team members, and the leadership of CEO Jessica Muroff, embarked on a diverse nine-month effort to create a new path. This path is not merely a United Way plan, it’s a community plan, informed by input from a broad and diverse group of community leaders and voices. As UWS surveyed community members, conducted focus groups, and scoured the nation for promising practices, UWS operated with a greater sense of urgency, because in the wake of this pandemic, UWS’ work has never been more important. Now, UWS and its over 100 strategic community partners is empowered with the road map, and it’s working to enhance and elevate its efforts to continue lifting up ALICE families and infusing diversity, equity and inclusion into practice.

4. What do you see as your organizations’ most important strategic learnings from the past year (e.g., about what drives impact, what your community needs, what kind of capacity/programming your organization needs to build to deliver on your intended impact)?

To more fully understand how United Way Suncoast could best work with its strategic partners and community members given the challenges facing the entire community, UWS launched an unprecedented community engagement campaign. This involved a public survey garnering nearly 850 responses, six highly interactive focus groups of community members and agency staff, “solutions sessions” with UWS stakeholders, discussions with a Steering Committee of practitioners and Thought Leaders, extensive Key Informant Interviews, and a six-hour retreat with the Board of Directors. From that engagement campaign, leaders recommitted their support on our Priority Impact Areas of Early Learning, Youth Success and Financial Stability, along with the Support Services people in need require (e.g. housing, health, emergency services, food) – all of which have been hit harder by COVID-19. In addition, the UWS team recognizes the many challenges of our strategic partners working in the human service sector and UWS’ role in supporting our shared work. These are the initiatives UWS will

- **Capacity Building of Nonprofit Sector.** Create and support a center that will facilitate developing shared service platforms among agencies, foster collaborative partnerships, and invest in agency capacity building needs.

- **Data for Impact Center.** Facilitate, sponsor and invest in a center with a local university to collect, synchronize, and analyze neighborhood, county and regional data on people in need, generate reports, identify disparities among racial and ethnic groups, offer training on how to collect and interpret data, and create an Impact Dashboard.

- **Multi-year funding and new funding streams for strategic community partners.** Allow agencies to apply for three-year funding cycles saving time and resources in applying annually when meeting benchmarks and offer new funding streams.

- **Address Navigation of Human Services Sector.** Facilitate, support, and universal application process used across agencies to make it easier for people in need to access and receive services.

- **Public Policy Advocacy.** Consider community members and strategic partners needs in identifying, researching, and supporting public policy measures that require UWS’ resources to advance policy changes at the local, state and national level.

- **Lived-Experience Advisory Council.** Identify persons with lived experience of poverty who can share authentic insights with UWS and its over 100 strategic community partners in identifying, researching, and supporting public policy measures that require UWS’ resources to advance policy changes at the local, state and national level.

5. What is happening in your field that you think we should know about?

In 2018, the United Ways of Florida released a research-based report representing the population by county living above the poverty level..... This ALICE (Asset Limited, Income Constrained, Employed) report paying families and individuals who provide invaluable services in our community. In 2021, UWFL updated this work to determine the impact COVID-19 has had on Florida families.

When respondents were asked to select their biggest concern, the top three concerns were household members contracting COVID-19 (38%), paying housing expenses (30%), and job loss (8%). However, the ranking of household concerns differed by ALICE status. For respondents above the ALICE Threshold, the top three concerns were household members contracting COVID-19 (52%), paying housing expenses (14%), and mental health issues (8%). For respondents below the ALICE Threshold, the top three concerns were household members paying housing expenses (44%), household members contracting COVID-19 (26%), and loss of jobs (8%).