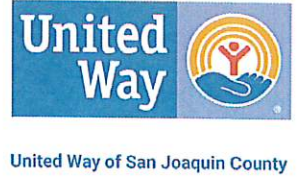


**NOTICE OF FUNDING AVAILABILITY
FOR
A NONPROFIT CAPACITY BUILDING PROGRAM**

Submitted by:
United Way of San Joaquin County
May 17, 2022

Section 4.3

Letter of Interest



Lana Lozano
City of Stockton Economic Development Department
400 E. Main Street, 4th Floor
Stockton, CA. 95202

To the City of Stockton,

United Way of San Joaquin County (UWSJC) has long recognized that our core mission is providing critical support to our community's nonprofits in assisting and supporting their team's professional development and overall organizational capacity-building abilities. Considered the "Chamber of Commerce of Nonprofits", UWSJC's purpose is to ensure the long-term sustainability and viability of our nonprofits to build the essential capacity required to serve clients, expand programs, and address the needs of our diverse community.

As such, the announcement of the notice of funding availability (NOFA) from the City of Stockton to provide financial assistance to a leading umbrella organization, presents an exciting opportunity for UWSJC to scale, expand and elevate our recently launched space called, *The NEST for Nonprofit Enterprise Support Team* to accelerate and advance our work in capacity building for Stockton's nonprofit sector.

Project Vision: UWSJC created the NEST as a vehicle to support our continued efforts to help Stockton-area nonprofits enhance the capacity necessary to affect change in San Joaquin County. The NEST model is a "one-stop-shopping" approach to providing education and training programs that help nonprofits build common approaches to capacity escalation. The 2,000-square-foot space opened in April is located adjacent to the administrative offices of UWSJC. It offers dedicated workspaces for one-on-one educational guidance, group education, retreats and flex space for the purposes of providing an academic setting for nonprofit employees, leaders, and their Boards.

Our vision at UWSJC is to build programs that equip nonprofits for action; preparing them for success by rapidly increasing their capacity to respond to emerging needs; provide leadership training to enhance skills as creative problem solvers; and offer resources to build healthy organizational structures that are more effective and efficient in addressing future crises.

And since city, county and state governments rely heavily on nonprofits to serve the community, the partnership between government and SJC nonprofits will offer opportunities to strengthen on all sides. There are currently no built-in systems of educational support or training in the county addressing these needs. We believe UWSJC and the City of Stockton can make significant progress to develop the nonprofit workforce and elevate our nonprofits to next-level service and impact.

Most importantly, UWSJC has made a vested interest in supporting more than 2,585 nonprofits in our county. The recently published *2021 Economic Impact of San Joaquin County's Nonprofits*, sponsored by UWSJC and University of the Pacific's Eberhardt School of Business, is a 15-page report that provides both a qualitative and quantitative snapshot of SJC nonprofits. This report highlights the value of nonprofits to the county, indicating that one in 20 full-time and part-time employees work for a nonprofit in SJC.

Equally important as part of this process is our partnership with Stockton's nonprofits. UWSJC launched the *Nonprofit CEO Leadership Forum*, established nearly three years ago, to bring together CEOs from top nonprofits to engage in collaborative learning and supportive dialogue. Our vision is centered on strengthening the foundations of our nonprofits, sustaining systems of support of both small and large nonprofits to meet the needs of those communities, the populations they serve and to join together in ONE VOICE to capitalize as advocates for change.

We hope that our NOFA submission captures and showcases UWSJC's unique ability to deliver on this NOFA and demonstrates our readiness to support the City of Stockton's strong interest in establishing a nonprofit capacity building program for our nonprofits.

With our internal infrastructure in place, our new physical space, together, with our experienced staff, and subcontractor relationships, we are prepared and situated to deliver on this grant. In short, we would be honored to serve as partners with the City of Stockton to fully manage and lead this program as a means to support the development of the vast network of nonprofits that serves the diverse needs of residents across our city.

UWSJC equally shares the vision with the City, in becoming the best city in America to live, raise a family, and grow a business — including a nonprofit business.

In Service,


Kristen Spracher Birtwhistle
President/CEO of United Way of San Joaquin County

Contact Person Representing our Agency

Kristen Birtwhistle
President/CEO of United Way of San Joaquin County
Contact cell at 209-642-0725
Kbirtwhistle@unitedwaysjc.org

Program Leads — resumes included

Liza Sysay
Zuleima Flores-Abid
Sam Prak

Section 4.4

Project Narrative

1. Purpose and Mission

Since its establishment in 1926, United Way of San Joaquin County (UWSJC) has redirected more than \$100 million dollars toward local nonprofits. UWSJC's mission is simple: *to improve the lives of people by mobilizing the caring power of communities*. That mission embodies how the work of UWSJC helps the lives of people through fund development, partnerships, and a strategic lens on all that we do. Similar to the City's own action plan we have culled an approach that includes working with the nonprofit sector in advancing staff skills and expertise in strengthening systems toward sustainability and measurable impact.

Those caring partnerships also galvanize support to both new and existing nonprofits to help advance their work within social impact areas from homelessness, education and housing to the arts, mental health, and economic mobility. By way of example, agencies such as Hospice of San Joaquin County and Council for the Spanish Speaking were incubated by fiscal support of UWSJC decades ago and are now multimillion dollar organizations.

We recognize this NOFA for *Nonprofit Capacity Building* fits uniquely within our organization's own mission which is based on our historic path of serving other nonprofits. We exist to direct dollars and support as "pass through" funds to more than 300 nonprofits annually. This year alone UWSJC has raised more than \$1M to support hundreds of local nonprofits.

Yet, the arc of UWSJC has changed significantly throughout the past three years. Our focus, which aligns with the NOFA, has been on directing greater attention to the support, education, and advancement of Stockton's nonprofit operations. We have facilitated surveys and research that resulted in critical data needed to understand the needs of both our nonprofit organizations and our community. We have provided numerous masterclasses for professional development and enhancement of skills in critical sector related areas. We have provided fiscal sponsorship to nonprofits to achieve their own 501c3 status. And now, with the NEST, we have the physical space and opportunities for directed attention and energy toward this work that will continue to strengthen and sustain our local nonprofits.

In fact, our 2022–25 strategic plan highlights four cornerstones of our work. One of those pillars is Community Leadership with a focus on mobilizing the caring power of our nonprofits. This includes the continuation of our Nonprofit CEO Leadership Forum, masterclasses, facilitated collaborations and efforts to promote the voice of our nonprofits.

2. Experience

Our experience in organizing efforts which benefits our nonprofits to perform better in support of their areas of interest or service delivery is vast. For example, due to the findings of the Economic Impact Report, we now know that the nonprofit sector is a powerful economic accelerator in San Joaquin County. Our county relies on more than 2,585 nonprofits to engage in work that improves the quality of life, advocates for fair and just legislation, feeds, clothes, and shelters those with less, encourages art and culture, and mobilizes efforts to increase equity and reduce inequality.

Behind the initiatives emboldening community transformation, are people. People are the drivers of positive change; however, there is a significant nationwide gap in workforce development and leadership training in the nonprofit sector. Social service nonprofits often operate with limited capacities while tasked with addressing complex problems that require extraordinary leadership, management, and organizational skills.

Over a one-year period, UWSJC did a deep dive, called “The Big Dig,” which included insight research into what elements are most needed to support our nonprofits. We garnered input from community leaders, from current and past donors, from civic leaders and academicians to gain a purposeful direction for UWSJC in terms of its own future state. That research revealed that nonprofits had limited abilities to work together, were managing in silos and were generally inefficient in managing broad based initiatives.

We discovered that our county had an opportunity to invest in this critical employment sector by leveraging the facilities, data, networks, and knowledge of The United Way of San Joaquin County to establish a program that would assist nonprofits with capacity building, workforce development, leadership training and business acumen to enhance and scale their efforts to help individuals and our communities reach their fullest potential.

Other related support UWSJC provided was the launch and mobilization of a SJC Shelter Committee that eventually became a part of the San Joaquin County Continuum of Care. For two years, UWSJC facilitated service providers and city municipalities to develop plans for increasing low-barrier shelter beds, warming and cooling centers and additional outreach or wrap-around services that would help unsheltered individuals gain access to care and housing. This Shelter Committee was able to then obtain funds from both the City of Stockton and San Joaquin County — more than \$500K — to launch those strategic programs. UWSJC was the organizing entity that tied those nonprofits together for the common good of the community.

Other initiatives stemming from the UWSJC’s vision included:

- UWSJC supported City of Stockton CARES ACT funding to support local nonprofits in facilitating and administrating support to each agency utilizing funds to provide equipment, services, transportation, and food to those challenged by COVID-19.

- UWSJC worked with San Joaquin County Community Clinics to expand COVID-19 medical surveillance and vaccinations against COVID-19 in 2020–21. We also engaged the nonprofits to assist and support countywide distribution of support to the unsheltered.
- In partnership with Dignity Health and San Joaquin County Public Health, we created a campaign called MASK-ON, in an effort to dispense information about the importance of mask wearing. More than 100,000 kits were distributed across the county with sanitizer and educational materials about COVID-19 prevention.
- Initiated by the San Joaquin County Continuum of Care, an Encampment Survey Study was initiated to gain a better understanding of the experiences of those who live in unsheltered situations. More than 380 people were interviewed to seek answers to how the homeless can be supported long term across our county.
- Through a Raymus Foundation Grant, UWSJC helped set up winter shelters in Manteca and Tracy in partnership with many local nonprofits and the cities.
- Developed Masterclasses during COVID-19 in providing month to month educational sessions in webinar format featuring speakers delivering on a myriad of leadership concurrent lectures.

Much of our vision for this program stems from what we learned during the pandemic. The pandemic left the local nonprofit ecosystem fractured and fragile. Unemployment and inflation had led to astronomical increases in the number of people needing services, stretching many nonprofits beyond capacity. Resources had been strained or depleted, and employee and volunteer shortages created burnout among those who have gone beyond the imaginable to provide for the community.

Turbulent times called for a stable corps of talented leaders who have the skills to empower, motivate and lead their organizations during years of crises and prosperity. And this is where UWSJC decided to part of the solution as part of its core battery of services.

3. Capacity

Organizational capacity includes several merits which ultimately allow for a high-functioning team. This includes structure, culture, leadership, fiscal oversight, and any action that will bring that nonprofit to the next level of operational, programmatic, financial, or organizational maturity.

Organizational Structure

For the past three years, under new leadership within UWSJC, we have intensively rebuilt our operational model to a current-focused position of supporting our nonprofits.

We have a strong team, a dedicated 2,000 square-foot office space that houses the NEST. The NEST includes two large suites, conversation areas, conference rooms and workspaces outfitted with Wi-Fi-ready systems and staffed to immediately support this nonprofit capacity-building program.

For the purposes of this program the following members of our team will be engaged in supporting the start-up and support of the NEST and the Nonprofit Capacity Building Program (resumes are attached):

- Liza Sysay, Senior Project Manager
- Zuleima Flores-Abid, Director of Community Impact and Public Policy
- Sam Prak, Accounts Manager

To develop new leaders and build strong organizations, it is critical that we model strong leadership, healthy culture, and solid infrastructure. UWSJC has redoubled its own efforts to reestablish its own cultural environment and invest in this new staff and systems to support those goals. We have worked closely this past year with a group called *Impact Foundry* which partnered with our board and staff to help reimagine our former strategic plan into a new three-year strategic action plan.

The new focus areas include:

- Action Through Advocacy
- Diversity, Equity, and Inclusion
- Community Leadership and Nonprofit Support
- Donor Centric

Financial Systems

Our fiscal systems have been updated as a result of hiring a new accountancy, auditors, and support staff for our Accounts Manager. In addressing our HR systems, we have a strong partnership with an agency called Single Point who manages our internal employment systems and is key to maintaining current practices with state HR policy and law.

United Way of San Joaquin County is currently using QuickBooks desktop as our main software to track accounting transactions and to produce financial reports monthly with month-end closing. We are also using Donation Tracker software to track donations and donor information.

Our basic organizational structure includes a CEO/President who reports to the chair of the board of directors, and we employ eight FTEs. Our business model is led with a matrix design versus Top Down, which keeps open communication between our teams and can help us be more innovative, nimble, and efficient. Using this structure prevents teams from needing to realign every time a new project begins.

Oversight for the Nonprofit Capacity Building Project would be supported by a specific Director of NEST Operations coupled with a Data Technician, who will work to analyze program effectiveness and monitor progress. They will work in unison with the CEO and Director of Community Impact and will be report up to the CEO, as well as to the Board Chair and Governance Committee.

Sub-Contractors and Partners

Our nonprofit capacity consultant team will be a blend of both local and outside agencies who specialize in those sector areas required by this NOFA. Each consultant will be vetted for expertise, results orientation, and available to support our nonprofit cohorts in Stockton.

We have several proposed partners who will work with our team to help deliver the menu of services to the nonprofit clients we will be serving. We plan to work with local consultants or sub-vendors, including a select few of our existing nonprofits who have subject matter expertise we can utilize and tap into to ensure “real time” experiential learning as needed. In addition, we’ll rely on academic institutions, such as University of the Pacific Eberhardt School of Business and Public Policy, and consultancy agencies that provide organizational capacity teams, to help deliver leadership development programs (both online and in person) with curriculum that meets the needs of our nonprofits.

Several agencies who will serve as sub-contractors will help us perform internal assessments, asset and resource review, legal and risk assessment and DEI evaluations of internal systems and external brand imaging as needed. Sub-contractors and partners who we will consider based on the awarding of this grant will include the following: others will be announced.

- Impact Foundry—Certified Sustainable Capacity Program, Asset and Resource Review, Strategic Planning, Board Governance
- Westgate Center for Leadership and Business—Board Development, Fund Development
- Single Point Outsourcing—Human Resources and Financial Basics
- Cantu Consulting and Port City Marketing — Branding and Communication
- Organizational Diplomacy—Leadership, Coaching and Training
- Grover Consultant Group—Visual meetings, Graphic Facilitation, Designing and Leading Change
- Maddox and Associates—Diversity, Equity and Inclusion, Leadership Development

4. Project Leads

The key members of the project team who will oversee the project are Liza Sysay, Senior Project Manager, Zuleima Flores-Abid, Director of Community Impact and Public Policy, and Sam Prak, Accounts Manager.

In partnership with selected members of our Board of Directors, these team members are qualified in leading and supporting this realm of work based on prior experience in nonprofit management, instructional design, program delivery and set-up.

As the CEO and President of United Way, Kristen Birtwhistle will be highly involved in the day-to-day management and oversight of this important work. Her 30 years of experience in health care and health education will be an asset to ensuring this work reaches its fullest potential.

Section B

Project Vision and Implementation Plan

1. UWSJC Approach: Service, Diversity and Cultural Competence

At United Way of San Joaquin County, our commitment to diversity is lived out daily in our work championing a community that welcomes and supports every individual. It is a source of strength and pride and is one of the most critical pillars of our work.

Our ability to embrace diversity and cultural competency is an integral part of our business and has UWSJC to serve and support our communities more efficiently. We bring together people with diverse backgrounds, experiences, political views, and expertise for dialogue, collaboration, and service to our community as a whole. These results engender rich conversations and vibrant partnerships that attract new volunteers, employees, and donors.

Both service and quality are foundationally built upon our commitment to diversity, equity, and inclusion, and they personify how we support our nonprofits, our workplace giving employer groups and community leaders. We have long recognized the City of Stockton as one of the most culturally diverse populations in the nation, and we are proud to care for this community with a lens on service excellence and treating everyone with dignity and respect.

In 2020, UWSJC hired Equity Praxis Consultants to help us direct a six-month “listening tour,” seeking input as to how the Black community perceives UWSJC. We asked what more we could do to address social injustices, equity, and inclusion. That final report was shared with our board, and we are making fundamental changes to engage all communities of color in terms of expanded vendor selection, board alignment and heighten support of nonprofits who serve a diverse population.

Our staff and board have a dedicated mission statement that defines how we address diversity; we have revised our board bylaws; and we currently have one of the most diverse boards in the history of our agency. We abide by the equity framework established by United Way Worldwide in our delivery of services to our nonprofits and the community at large.

Training on DEI is now a required action for our staff and board of directors. And will be a required training within this year. Click here to access the United Way Worldwide Equity Framework Model:

https://s3.amazonaws.com/uww.assets/site/Publications/United_Way_Worldwide_Equity_Framework.pdf

UWSJC policies and procedures were changed throughout the past two years to reflect the changing priorities and importance of the diverse community we serve.

2. Implementation Plan

Our dedicated staff and Board of Directors will be responsible for the startup and long-term sustainability of the Nonprofit Capacity Building program. In fact, our existing core services have included a major focus on serving as a convener for several years, and we are in a unique position to immediately begin delivery of the proposed services in terms of space, systems and subject matter expert teams that can be directed to initiate the program.

The startup process of this implementation plan aligns with our current strategic plan where our focus is to help lift up our nonprofits through collaboration, education, and training.

If funds are awarded, we will immediately establish a NEST Advisory Team that will work hand-in-glove with our staff and the City of Stockton stakeholders to refine the plan and approach to launch this initiative in the summer of 2022. That Advisory Team will be a blend of existing nonprofits, both large and small, a subset of our partners, and COS representatives who can collectively frame our work from year #1 to year #3. A soft launch in June will be scheduled to determine if any kinks in NEST operations needs to be refined such as space utilization, IT connectivity, our new software scheduling application and more.

UWSJC manages all project coordination using web-based tools such as SharePoint and Mondays.com — platforms where we can track and trade updates on all elements of this project across the team. Week-to-week sessions will be hosted with our UWSJC Executive Team to ensure compliance with the implementation plan including monthly reports directed to the COS for progress updates.

Risks and areas of challenges will be mapped out early within the implementation phase. At the beginning of this process, we will work with selected focus groups of nonprofits to determine interest and engagement and to ensure that our educational options will be met with both support and use. This focus group will stay connected with us for the first year of program delivery.

A critical step in the ongoing delivery of a quality product will be building on our existing relationships with our nonprofits. If we are to service our programs in relevant ways which meets the needs of each agency, it will be imperative to be in constant alignment and contact with our partners. The current monthly meetings with the county's top nonprofits, most from Stockton, will continue to be hosted. The Nonprofit CEO Leadership Forum will be our mechanism by which we leverage services and maintain our focus on service, diversity, equity, and quality programming.

Resources will be allocated based on required tasks, contracting requirements and program delivery needs. A timeline will be created by the Advisory Committee showing a year 1–3 trajectory. That timeline will be a blend of our current 2022–25 strategic plan aligned with the City of Stockton's existing plan.

3. Operations

The operation of the NEST as highlighted earlier provides physical training space dedicated to the Nonprofit Capacity Building program and will be open Monday–Friday and extended hours and weekends as necessary. The NEST is a 2,000-square-foot space located at 777 N. Pershing Ave, Suite 1B, and is adjacent to our administrative offices. This space provides the operational convenience of 3 small rooms for consultations, larger conference space to host group sessions, and flex space for use as needed to work as a hybrid office site. Audio Visual equipment, Wi-Fi, and dedicated phone systems are present, and a kitchen and bathroom facilities are part of the space. Plenty of curbside parking is available at the NEST.

The NEST will be the hub of our work for this project and will include dedicated staff to manage these operations. However, when the space is needed for evening or weekend support, we will staff up as needed to accommodate the needs of each group.

Site control will be managed by our existing Office Manager for our current administrative offices, and a dedicated Director of the NEST will be assigned to manage all project objectives to ensure the implementation plan and partnerships with both nonprofits and sub-contractors are functioning at optimal capacity. All areas required within the NOFA application.

4. Services

The primary core program of the Nonprofit Capacity Building program is to subcontract with *Impact Foundry* in the delivery of their Certified Sustainable program. This program will allow for 20 nonprofits per year to be included in this year-long training.

Certified Sustainable is Impact Foundry's 12-month cohort-based flagship program that develops economically viable and healthy ecosystems for nonprofit organizations to fulfill their mission and scale their impact. The pillars of the sustainable training are:

- Revenue Structure
- Operational Framework
- Nonprofit Brand and Community Engagement
- Board Governance

Participating organizations attend in teams and draft a multi-year sustainability plan that focuses on at least two of the four pillars. For many organizations their Sustainability Plan serves as their strategic plan.

Each sustainability plan includes a focus on how to pay for and implement whatever growth and impact organizations want to make in the communities they serve. By putting measures in place to be competitive in private, government and corporate funding, they are better able to compete for new forms of funding. Organizations that complete the Certified Sustainable

program finish as stronger, more resourced organizations with increased capacity to deliver on their missions and able to educate funders of the value their work provides to the communities they serve.

Additional Programs will be formed based on focus group feedback with single to multi-session programs offering customized or general curricula. We will use the Masterclass model to set up courses in both webinar format and in-class, didactic course delivery. Samples of prior Masterclass formats included Branding, Managing Compassion Fatigue, Budget, and Finance, Creating High Performing Teams and more.

5. Methodology, Evaluation and Outcomes

UWSJC and Impact Foundry believe every nonprofit organization could benefit from the Certified Sustainable program, whether a small startup or a multimillion-dollar agency. The curriculum is built on research defining adaptive leadership and operational best practices in nonprofit management. The program is evaluated with support from the *University of the Pacific's Benerd College* as part of a continuous improvement and quality assurance effort. They track graduates to further evaluate components of our curriculum and our technical assistance.

The purpose of this work is to strengthen nonprofits so they can serve more people, serve more effectively, and prove the efficacy of their work to funders. Participating organizations complete an initial assessment that addresses revenue diversification; strategic planning, marketing, and fundraising plans; board engagement; volunteer management; advocacy activities; donor practices; reserve funds; technology and staff resources; and incorporation of consumer feedback in their program.

Each facet of the curriculum includes pre- and post-evaluations to gauge increased knowledge and capacity.

Short-Term Outcomes:

- Each organization has a multi-year sustainability plan it can use with funders, the Board, and community partners, which informs their operations.
- A certification is conferred that denotes graduates are ready to compete for larger, more complex funding opportunities.
- The organizations are better connected to each other, to experts in the nonprofit sector, and to our regional funding sector.

Long-Term Impact:

- Our nonprofits are effective at securing and performing on grants and contracts, and they are successful because they have a strong operational infrastructure and good cash flow management.

6. Outcomes

The anticipated impact of our programs, as defined above, includes both short- and long-term successes by being part of the Certified Sustainable Program and broader education and training programs in specialized areas from branding and communication to volunteer development or program performance.

We anticipate serving 20 or more nonprofits per year for the full-year sustainability program and up to 50, as we offer individual master classes and training with specialized consultants, based on the needs of our nonprofits.

The impact of each of these programs is to ensure the following:

1. Successful staging of strategic and implementation plans that govern the mission of each organization. Part of that mission is to ensure long-term success and viability of that agency to meet programming and service delivery needs.
2. Ensuring that employee retention and hiring is a priority by helping each nonprofit create a workforce environment and culture that promotes employee engagement and support, opportunities to transition to higher levels of leadership and maintaining stability within the organization.
3. Creating better boards with the ability to adapt to the new work environment of nonprofits and to serve as vehicles of resources, funding, and expansion of services.
4. The Certified Sustainability program will focus on advancing the health of each nonprofit helping it to be primed and ready to seek larger scale government funding or foundation grants and to be capable of orchestrating those funds for the purpose of helping advance the community at large.

For all other programs, data will be collected in the form of pre and post evaluation surveys plus exit interviews at the close of each program will be standard practice.

Section C

Program Readiness

1. Program Readiness

The below program readiness steps include the following actions and tasks. It also highlights UWSJC's organizational timeline for standing up the program. The program would be operating at full capacity after Q3 tasks are completed including facilitating focus groups, establishing an advisory committee, dedicating staff, and implementing full operations of the NEST space. Launch of the first cohort of students for the Certified Sustainable Program is scheduled to begin in October 2022 if not sooner.

While part of this year will be dedicated to startup, in terms of space, staff, and committee readiness, we will spend equal attention to marketing of this unique City of Stockton initiative. Additionally, continuing to nurture our relationships with our nonprofits and subcontract partners will be a critical implementation task to ensure that we are meeting the needs of our partners and meeting the objectives of the grant.

Time Frame-Year One	Action
Q3 July–September	<ul style="list-style-type: none"> • Design and develop the Nonprofit Capacity Building curricula • Build the Focus Group and Advisory Committee • Set up systems of enrollment, selection of nonprofits to be part of the initiative and establish “contracts” to ensure nonprofit engagement • Hire dedicated Nonprofit Capacity Building Staff • Open the dedicated office space for the “one-stop-shop model” Nonprofit Capacity Building program for COS
Q4 October–December	<ul style="list-style-type: none"> • Select cohort and complete application process for Certified Sustainable Program • Plan and implement an orientation to the Nonprofit Capacity Building Program for all nonprofits with a major launch with the COS and UWSJC • Schedule standing quarterly meetings with COS, updates, progress • Host first of quarterly Advisory Committee meeting
Q1 January–March	<ul style="list-style-type: none"> • Continue Certified Sustainable programming • Deliver masterclass on Board Development
Q2 April–June	<ul style="list-style-type: none"> • Continue Certified Sustainable programming • Deliver masterclasses on Service and Quality • Host first City of Stockton Nonprofit Capacity Summit in partnership with the Nonprofit CEO Leadership Forum, UWSJC and University of the Pacific
Year 2	<ul style="list-style-type: none"> • Establish second cohort for the Certified Sustainable Program • Deliver masterclasses and define topics for Year 2 • Refine Implementation Plan based on Year 1 programming
Year 3	<ul style="list-style-type: none"> • Establish third cohort for the Certified Sustainable Program • Deliver masterclasses and define topics for Year 3 • Refine Implementation Plan based on Year 2 programming

Section D
Approach to Equity and Non-
Discrimination

1. Commitment to Equity and Inclusion

UWSJC's policies and mission statement fully embrace the importance of diversity, equity, and inclusion both in the internal operations of our organization and in the fulfillment of our mission.

Elements of that commitment are inserted into our Bylaws, Policies and Procedures as part of EEO mandates, and are included in our Employee Handbook. As part of our new board requirements, each member must sign a code of ethics document attesting to full support of diversity as part of their role with UWSJC.

As a member of United Way Worldwide we are required to abide by the equity practices established by our Worldwide board and must ensure that our vision and mission are visibly apparent to all who work with UWSJC.

At the foundation of the framework is a shared definition and vision of equity and six levers that United Ways employ to advance equity: data, community mobilization and engagement; communications and awareness building; fundraising, resource allocation and grantmaking; policy and advocacy; and local capacity building. This is part of our Equity Framework that UWSJC is deploying this year internally with our staff and board.

We recognize structural racism and other forms of oppression have contributed to persistent disparities, which United Way seeks to dismantle. Our United Way network strives to engage community members, especially those whose voices have traditionally been marginalized.

We work with residents as well as public and private partners to co-create solutions that ensure everyone has the resources, support, opportunities, and networks they need to thrive. We commit to leveraging all assets (convening, strategic investments, awareness building, advocacy) to create more equitable communities.

In all that we do—from programming to our own staff hiring practices, we perpetual seek to ensure that all races, genders, ages are represented and that we seek to ensure that our Board of Directors reflects the diversity of our community as well.

Required Forms — attached

- Applicant Summary — included
- Preliminary Budget — included
- Project Schedule — Included

Demonstration of Financial Capacity — attached

Letter of Statement from the Accountant attesting to due diligence review of statements — included

- Balance Sheets (past three year)
- Profit and Loss Statements (past three years)
- Statement of Review from Accountant or Accounting Firm

Insurance Requirements

- Certificate of Insurance