

Housing Assistance for Georgetown Households

2021 GHF Annual Grant Program

Catholic Charities of Central Texas

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Application Form

General Instructions

If approved, should they receive the short or long application?

Long

Congratulations on your advancement to the full application stage!

Please complete the remaining sections of the application. The first four sections labelled "LOI" are included for your reference and are "read only."

Program Name & Amount Requested

Program Name*

Housing Assistance for Georgetown Households

Amount requested

\$50,000.00

LOI - About Your Organization

Organization Mission

People of faith serving anyone in need by strengthening families and promoting respect for human dignity and life.

Organization Vision

A Central Texas in which every person thrives in their God-given gifts and dignity.

Date of Incorporation

03/08/1999

Describe your organization's scope of work

Since 1999, Catholic Charities of Central Texas has worked to meet the needs of the most vulnerable members of our community in order to strengthen families across a 25-county region. Our goal is to end poverty in our community by breaking the cycle of financial, educational, and social deficits for the working poor. We stand in solidarity with those who are most vulnerable, especially children and the elderly, immigrants and refugees, people with disabilities and health needs, and those who are marginalized because of their religious beliefs, gender, race or nationality. We offer the following six programs under one roof that take a holistic approach to help families reach their full potential. Counseling Services: Provides low-cost mental health services on a sliding fee scale virtually or in person. Disaster Response: Responds to disasters in the immediate aftermath and during the recovery phase to help families return to their pre-disaster state or better. Financial Stability: Builds the well-being of families by helping them maintain stable housing, equipping them with financial education, and connecting them with other resources needed to reach their full potential. St. Gabriel's Pregnancy and Parenting Program: Helps families give their children a healthy start at life through evidence-based prenatal and parenting education, family case management and guidance, mentoring and advocacy, and material items. Immigration Legal Services: Offers affordable legal assistance for individuals and families eligible to apply for immigration benefits with a focus on family reunification. St. Michael's Veteran Services: Provides case management, financial assistance, and referrals for veterans and their families.

How many unique individuals did your organization serve during the prior fiscal year?

12136

What geographic area does your organization serve?

Catholic Charities of Central Texas serves 25 Central Texas counties: Bastrop, Bell, Blanco, Brazos, Burleson, Burnet, Caldwell, Coryell, Falls, Fayette, Hamilton, Hays, Lampasas, Lee, Limestone, Llano, Mason, McLennan, Milam, Mills, Robertson, San Saba, Travis, Washington, and Williamson. Offices are located in Austin and Bryan, Texas.

Please select the Georgetown zip codes your organization currently serves:

78626 78628 78633 78634 78673 78674

LOI - Financial Overview

UPLOAD: Most Recent Audit.

Please upload your organization's most recent audit and include all formal communication received from the audit firm in relation to the financial statement audit.

NOTE: If your organization has not commissioned an audit AND if you are applying for less than \$25,000, GHF will accept a CPA-prepared financial statement review. As with the audit, upload all formal communication received from the firm in relation to the review.

****GHF will not accept Forms 990, 990-EZ, or 990-PF in place of an audit or CPA-prepared financial statement review.****

All documents must be uploaded as one PDF.

LOI - Funding Request

PRIORITY 1: Basic Needs (Physiological)

Please identify the focus area(s) your proposal seeks to address (select all that apply):

Shelter/Housing

PRIORITY 2: Basic Needs (Safety) & Social Determinants of Health

Please identify the focus area(s) your proposal seeks to address (select all that apply):

Personal Security

Priority 3: Supporting Social Determinants of Health for Priorities 1 & 2

Please identify the focus area(s) your proposal seeks to address. Select all that apply:

Emergency Financial Assistance

Proposal Narrative

Describe how GHF grant funds will be used, if awarded. Please be sure to explain how your organization and this funding request aligns with GHF's Mission, Vision/Vision Philosophy, and Target Population. Specifically identify the target population with which you will be working.

Georgetown Health Foundation grant funds will be used to provide 25 Georgetown-area households with up to three months of rental or mortgage assistance. Through this effort, Catholic Charities aims to help families remain stably housed while utilizing their limited financial resources to meet other basic needs. Assistance may go toward current balances or arrears as families work to recover from the widespread economic impact of COVID-19. A 2019 Williamson County Community Health Needs Assessment identified lack of affordable and safe housing as a top health concern, and affordability and cost of living increases as primary external factors that create both opportunities and challenges in the region(1). In two Georgetown zip codes (78628 and 78633), more than 40% of renters spent 30% or more of their income on housing alone. During this COVID-19 pandemic, the need has grown sharply. Families who have never faced a financial shortfall are seeking help from social service agencies for the first time. Job loss or hour reduction forces families to choose between paying their rent and utilities, putting food on the table, or buying diapers for their babies. From March to April 2020, the Georgetown unemployment rate more than doubled, jumping from 4.9% to 12.3% (2). Though Georgetown's unemployment rate has dropped since its height in April, it has hovered between 5.5% and 7.5% since June. We know that for the 30,000 Georgetown ALICE households (3) (Asset Limited, Income Constrained, Employed) who already struggle to make ends meet, bouncing back from a temporary loss of income will not be possible without assistance. Even with eviction moratoriums that have kept qualifying tenants from losing their housing in the short-term, many will not be able to afford the arrears that will be due when the moratorium lifts. By providing up to three months of rental or mortgage

assistance, Catholic Charities hopes to stabilize families' housing so that they can move toward full financial recovery. Due to the COVID-19 pandemic, all Catholic Charities program services are now provided remotely. A grant from GHF for housing assistance will be managed by our Financial Stability program. Specifically, the financial assistance will be administered by a Jesuit Volunteer Corps member under the supervision of the financial stability program manager. Jesuit Volunteer Corps places young adults (primarily recently college graduates) with direct service organizations that address social justice issues for a 1-year placement. Jesuit Volunteers (JV's) receive a modest cost of living stipend and allow organizations like Catholic Charities to increase impact with only a modest investment. Catholic Charities has utilized JV's in our Financial Stability program for the past six years to better respond to the demand for assistance. Georgetown residents requesting housing assistance will call our main office line and will receive a call back from the JV within 72 hours. Clients will scan and email or take photos of their eligibility documentation. Documentation can be submitted by mail or in person for clients who do not have technology access. Case management services will be provided by phone or video conference. Financial assistance will be distributed remotely by communicating with landlords by phone and mailing checks directly to vendors. Should circumstances change to allow in-person service delivery, Catholic Charities will contact a local Georgetown church or service provider to secure space for face-to-face appointments. Aligned with GHF's target population, Catholic Charities' Financial Stability program serves households who live at or below 200% of the federal poverty level and who have experienced a financial crisis which puts their housing at-risk. We seek to engage, educate and empower our clients to fulfill their unique potential, and to eliminate financial, educational, social and spiritual poverty across our service region. We recognize that financial support alone does not end poverty, but that when individuals are stably housed, they are able to direct their attention to other elements of wellbeing, including work, family, and physical and mental health. 1 Community Health Assessment 2019, Williamson County and Cities Health District (WCCHD) et.al. retrieved from <https://gthf.org/wp-content/uploads/2020/01/CHNA-Williamson-County-2019.pdf>. 2 Texas Labor Market Information, Local Area Unemployment Statistics Report, retrieved from <https://texaslmi.com/LMIbyCategory/LAUS>. 3 Alice in Williamson County. Retrieved from https://www.unitedway-wc.org/sites/unitedway-wc.org/files/Williamson%20County%20ALICE_AllTowns.pdf.

UPLOAD: Proposal Budget & Expense Narrative

Please upload your proposed budget and include the following details:

Staff. Position title(s), salary(ies), and fringe working directly with this program. Include rationale for each position and percentage of time these positions will spend on the program.

Supplies. List descriptions and costs for each supply, including rationale as to why these supplies are essential to the success of the program.

Overhead. Provide your organization's overhead rate and the rationale for that rate. If you include a line item for an administrative position(s), please provide salary percentage and rationale.

LOI - Relationship with Georgetown and GHF

Collaboration

In what ways do you collaborate or coordinate your services with other local organizations to serve Georgetown-area residents?

Catholic Charities receives referrals from our Georgetown-area community partners such as The Caring Place and the Society of St. Vincent de Paul at St. Helen Catholic Church. Our intake specialist regularly shares information on Catholic Charities services and eligibility requirements with local agencies in order to facilitate good referrals and promote stewardship of each organization's resources. We receive funding for

utility assistance through FEMA's Emergency Food and Shelter Program (EFSP) for Williamson and Travis County zip codes, which includes Georgetown, as well as funding for Atmos Energy customers toward their gas bills. The Caring Place screens their clients for financial assistance eligibility and refers Atmos customers to Catholic Charities so we can pay their utility bill. Clients who receive rent or mortgage assistance through GHF funding will be assessed for their need of utility payment support as well.

Describe your organization's work in Georgetown

In our last fiscal year, Catholic Charities served 100 Georgetown residents across five programs: Counseling Services, Financial Stability, Immigration Legal Services, St. Gabriel's Pregnancy and Parenting Program and St. Michael's Veteran Services. In October 2020, our Counseling Services program partnered with St. Helen Catholic Church and School to provide mental health presentations in English and Spanish to 141 parents of school-aged children. Additionally, thanks to support from the Georgetown Health Foundation we have provided utility assistance to 129 individuals in 36 households that have been financially impacted by COVID-19 since October.

How many unique Georgetown residents did your organization serve during the prior fiscal year?

Out of the total number of unique individuals your organization served during the prior fiscal year, how many were Georgetown residents?

100

Is your organization's main office located in Georgetown?

No

If no,

where is your organization's main office located? Do you maintain a satellite space in Georgetown? If so, what is the address of the Georgetown-based satellite space?

Has your organization ever received a GHF grant?

Yes

Do you currently receive any form of rent assistance from GHF?

No

If yes, please provide:

- Property address;
- Annual rent payments to GHF;

- Annual grant dollars committed by GHF to your organization specifically associated with your lease agreement.

Organizational Strategy & Capacity

Instructions. The following four questions were adopted from Charting Impact, developed by the Better Business Bureau Wise Giving Alliance, GuideStar USA, and Independent Sector. We include these questions because they give us a holistic understanding of your organization's approach to achieving your mission. ***Remember to answer these questions at the organizational level, not the program level.***

NOTE: If needed, upload additional information (methodology, rationale, citations for key statistics and research) in a separate document when prompted in the "Citations, Acknowledgement, & Assurance" section.

What is your organization striving to accomplish?*

Clearly and concisely state your organization's ultimate goal for intended impact. Examine how your goals for the next three to five years (or an alternate time frame specified in your answer) fit within your overall plan to contribute to lasting, meaningful change. When finished ask yourself, "If someone unfamiliar with our work were to read this, would they have a clear definition of what long-term success means for my organization?"

Yes. Catholic Charities of Central Texas was formed in 1999 when a group of concerned citizens approached Bishop John McCarthy about the need for the Catholic community to come together to serve families in need. Without hesitation, Bishop McCarthy said, "Yes." Today, Catholic Charities of Central Texas is a multi-service agency, serving individuals and families across 25 Central Texas counties. At Catholic Charities, we work to build a stronger community by advocating for the most vulnerable and fostering relationships with community partners to amplify the impact of our efforts. We serve anyone in need regardless of religion, age, race, gender, sexual orientation, socioeconomic status, or legal status. Client services do not include or require proselytization or worship. Our goal is to move working poor families out of poverty permanently. When a family is living in poverty, there are often underlying issues, such as racism, lack of quality education, lack of healthcare access, discrimination, and more. Understanding these complex barriers, we offer holistic services to address not only financial poverty, but educational and social poverty as well. We strive to say "Yes" to each person who comes to us for help. We say "Yes" to the working poor who deserve so much more than getting lost in a broken system. One where they make too much to qualify for government assistance. One that only puts a Band-Aid on the problem and then criticizes them for coming back through the doors. Success for us is when a household is earning a living wage, has no inappropriate debt, is off government assistance, and has three months of savings to weather life's storms. We say "Yes" to this approach of serving because we know it changes families for today, but also combats generational poverty to come. We are committed to going deeper with families to ensure all their needs are met, so that they do not have to return for services. Our long-term strategy is that we have sufficient access to our programs for anyone within our 25-county service region through either physical office locations or technology (i.e., virtual services, mobile workshops, etc.).

What are your strategies and capabilities for making this happen?*

Describe your organization's strategies and capacities that support your long-term progress toward accomplishing the goals you cited in the previous question. Specify why your organization believes the methods you employ will benefit your target population and/or advance your issue. Detail your organization's core assets, including internal and external resources.

Our strategic map outlines our competitive advantages and guides our direction. Faith-Driven: Our religious values and the Catholic Social Teachings are at the core of the work we do. Our partnerships with

123 parishes and 20 Catholic schools across our 25 counties allow us to connect meaningfully with the communities we serve. Service-Centered: We offer six holistic programs under one roof to better meet the needs of our clients and their families. Our ability to provide internal referrals allows us to address poverty in all its forms. Community-Focused: We tailor our services to meet the unique needs of those living in poverty in Central Texas. At Catholic Charities, we work to build a stronger community by advocating for the most vulnerable and fostering relationships with community partners to amplify the impact of our efforts. What sets Catholic Charities apart as a service provider is that families can access a wide variety of services under our roof. Our programs work concurrently to build the well-being of families to help them reach their full potential. Our holistic, client-centered services are a keystone of our service model. We work to prevent homelessness by helping families secure safe, stable housing and stable employment. We serve veterans and their families by providing resources to improve quality of life. We serve new and expectant parents through evidence-based education so they can give their children a healthy start at life. We serve immigrants and victims of war, persecution, and disaster by helping them rebuild their lives and regain their livelihood. We work to address disparities in mental healthcare access by providing affordable, accessible counseling in multiple languages.

How will your organization know if you are making progress?*

Explain how your organization assesses progress toward your intended impact. Identify milestones that signal progress and success. Describe your assessment and improvement process: the methods you use as you measure key indicators and how your organization uses that information to refine your efforts.

Catholic Charities is committed to program evaluation. Every program has outputs, outcomes, and a logic model to assess the impact of our services. Our program directors compile output and outcome data monthly to track progress toward annual goals, which is reviewed quarterly by the agency's senior leadership team. In addition, the program staff assess and address variations in service delivery plans monthly, propose needed programmatic changes in the form of action plans for each deficient area, and evaluate improvements on a quarterly basis. Outcomes tracked to measure progress toward our goal of eliminating poverty: - Percent of households that maintain stable housing as measured by a housing stability assessment tool. - Percent of immigration applications that are approved by U.S. Citizenship and Immigration Services. - Percent of individuals receiving mental healthcare who experience a reduction in symptomology related to depression, anxiety, and quality of life as measured on pre- and post-survey. - Percent of parents who demonstrate an improved understanding of child development as measured on pre- and post-tests. - Percent of veterans who report improved outlook on life as measured on exit survey. We measure outputs and outcomes to improve the quality of services for our clients. Our goal in measuring results is to ascertain whether our services are creating lasting, life-enhancing changes in our beneficiaries' lives.

What have and haven't you accomplished so far?*

Demonstrate recent progress toward your long-term goals by describing how your near-term objectives are propelling your organization toward your ultimate intended impact. Go beyond the outputs of your work to make clear how these outcomes are contributing to fulfilling long-term goals. In describing both outcomes achieved and those not yet realized, include what your organization has learned about what does and doesn't work, what risks and obstacles exist, and what adjustments to goals, strategies, or objectives have been made along the way.

We strive to end poverty through all our programs, working with families to help them achieve their financial, physical, and emotional needs and goals. In fiscal year 2020, CCCTX accomplished the following: - 623 clients received 3,890 counseling sessions in Counseling Services and 69% reported reduced symptomology - 1,318 clients served and 96% of applications approved in Immigration Legal Services - 1,094 clients served and 556 classes conducted in St. Gabriel's Pregnancy and Parenting Program - 3,022 clients served and 83% maintained housing at program exit in Financial Stability - 175 clients served in St. Michael's Veteran Services - 4,161 clients received resources and referrals through Central Intake - 615 clients across 12 counties supported by Disaster Response's COVID-19 relief funds Goals we have not yet achieved due to

limited financial and staffing resources include: - To serve clients in all 25 of our service counties annually. - To establish an office location in a northern service county. - To expand office hours across all programs to improve accessibility for clients who work 9-5. The following are adjustments we have made to our programs in response to obstacles and lessons learned: - Counseling Services - We adjusted our hours so that we are open on Saturdays and until 7:00 pm four days a week. Extending our hours has allowed more clients to attend evening appointments and receive services more regularly. - Financial Stability – Increased the amount of time clients spend enrolled in case management so that they are more likely to remain housing stable after program exit. - St. Gabriel's Pregnancy and Parenting Program – Increased the eligibility age from up to one years of age to up to three years of age in response to parents requesting additional time in the program. - Immigration Legal Services – Added a removal defense attorney to our legal team because there was a gap in services for immigrants who earned too much to qualify for pro bono services but too little to afford a private attorney. - Disaster Response – Invested in a Director of Disaster Response position due to increased occurrences of natural disasters in Central Texas. - St. Michael's Veteran Services – Texas has the highest number of female veterans in the nation. Increased outreach efforts to female veterans by serving on local committees and hiring a counseling intern specializing in female veterans who have seen combat.

Organization Staff*

How many staff does your organization have? What is the percentage of staff turnover during the last 12 months? What are the primary contributors to staff turnover?

CCCTX has 53 staff members. The percentage of staff turnover during the last 12 months is 15.6%. Nonprofits have an average turnover rate of 19%. Primary contributors to staff turnover are caregiver burnout and low pay compared to the for-profit sector. CCCTX did not have to lay off any staff during the pandemic. Staff were busier than ever, serving twice as many clients as during a normal year. Agency leadership frequently encouraged time off, self-care, and self-compassion during an extraordinary year of challenges.

Organization Volunteers*

Does your organization engage volunteers to deliver its programs and services? If so, please describe how they help you to achieve your organizational and programmatic goals.

Last fiscal year, 496 individuals volunteered with Catholic Charities for a total of 14,200 hours. The value of this volunteer work to the agency was \$386,240. We employ a Volunteer Coordinator who recruits, trains, and assigns volunteers. Volunteers support the mission of Catholic Charities by: - Returning phone calls to assist with client intake and appointment reminders. - Assembling packs of diapers and wipes, hygiene kits, and PPE kits. - Translating documents for immigration applications. - General office work, including scanning, shredding, and filing. - Disaster relief support, including drive thru distribution events, organizing, and preparing supplies, and transporting materials. During the pandemic, CCCTX has looked for innovative ways to engage our volunteer force, while adhering to all safety precautions. For example, we have asked volunteers to assemble material donations at home and assist with our outdoor distribution days.

Organization Board of Directors*

How many Board of Directors does your organization have? What is the percentage of board turnover during the last 12 months? What are the primary responsibilities of your Board of Directors?

CCCTX has 18 board members. The percentage of board turnover during the last 12 months is 5%. One board member resigned due to the impact of COVID-19 on her family. Primary board member responsibilities are to provide sound governance to increase Catholic Charities' viability and sustainability. The Board: - ensures that Catholic Charities' mission is responsive to the needs and aspirations of the community which

guides the administration and delivery of services; - conducts strategic planning every five years to set the organization's strategic direction and support an inclusive management-directed, organization-wide long term plan; - understands and exercises appropriate stewardship in fulfilling fiduciary duties; and - ensures that the organization has the necessary facilities, staff and material resources needed to conduct its programs.

UPLOAD: Board List*

List each board member's name, place of business, home address, and years with the organization. ***Specify the percentage of board members that make a financial contribution to your organization.***

Board of Directors List.pdf

Georgetown Community Responsiveness

What makes your Georgetown efforts unique to the community?*

Briefly describe what sets your work apart from other nonprofits in the area and why your organization is best situated to provide this service(s).

That CCCTX will provide up to three months of rental or mortgage assistance with short-term case management sets the project apart. To our knowledge, nonprofits serving Georgetown most frequently provide one-time financial assistance. At present, CCCTX also only has limited resources to provide one time rental or utility assistance in Georgetown. One year into the pandemic, many families are many months behind on expenses. One-month of rental assistance is helpful, but they must piece together aid from multiple nonprofits to catch up. Financial challenges were compounded by the winter storm in February. CCCTX's project to provide up to three months of rental assistance and short-term case management prioritizes depth of services over quantity of households served to stabilize families more firmly. We work with families to assess how much of their housing expenses they can cover and fill in the remainder with our financial assistance. Additionally, the pandemic has necessitated that we become adept at offering all our programs virtually, allowing us to reach more individuals who live far away from our Austin or Bryan office locations. Once it is safe to gather in person again, we will continue offering virtual services to increase accessibility. Georgetown households will be referred to other CCCTX programs as needed, which they can access virtually. A unique element of receiving services at CCCTX is that clients are seamlessly referred to multiple programs in a wraparound service approach. If a Georgetown resident approaches us for housing assistance, we will assess all of their needs and refer them for mental healthcare, parenting resources, immigration legal services, or veteran services as necessary.

How does your organization interpret needs and adapt its programs accordingly?*

Describe how your organization monitors evolving community needs and adapts its work to meet them. Provide a recent example.

CCCTX interprets needs by: - Listening to our clients and asking about their service experience. - Participating in local collaboratives on homelessness, immigration, mental health, and long-term disaster recovery. - Asking agency staff to serve on strategic leadership roles in the community. - Assessing our service numbers and program results to look for patterns. A recent example of adapting to meet community needs comes from our Immigration Legal Services (ILS) program. With a new federal administration proposing sweeping immigration reforms, ILS is experiencing an increase in phone calls and wait times for appointments. We are working with Avantogy – an Austin-based company – to leverage artificial intelligence in streamlining our intake process. Using Avantogy's solutions, we are now able to accept intake forms via our

website, swiftly develop and edit computer generated videos on our intake process and FAQs, and generate automated emails to ensure clients their application is received.

Research commissioned by GHF in 2019 and 2015 revealed participants' experience with unequal treatment due to race, citizenship, education, and socioeconomic status. They also expressed a desire to have more voice in decisions that impact them.

The following two questions are designed to help GHF understand how you make your resources visible and accessible to all eligible participants.

Publicizing and Recruiting*

How do you ensure that Georgetown community members who need these resources the most are aware of them? If funded, how, when, and where will you publicize/recruit to engage them?

We ensure Georgetown community members know of our services available to them by: - Advertising the program to Georgetown and Georgetown ETJ parishes in the Diocese of Austin so they can publish in their bulletins. - Featuring the program on Catholic Charities' bilingual and mobile friendly website. - Sharing on Catholic Charities' social media, tagging relevant partners. - Outreach to our existing referral partners, The Caring Place and St. Vincent de Paul at St. Helen's Catholic Church. They will have a single point of contact at CCCTX to which they can send direct referrals. - Having an online resource page on Aunt Bertha. - Advertisement through 2-1-1. If funded, we will publicize services within the first month of receiving the grant award. Services will be promoted in local Catholic parishes, on CCCTX's website and social media, press releases targeted to priority service populations, via Aunt Bertha, 2-1-1, and through outreach to other Georgetown-area nonprofits.

Considering the program locale, how are transportation and accessibility addressed?*

CCCTX is adept at providing services remotely, having pivoted to a fully virtual model in March 2020. Because it is uncertain at which date it will again be safe to gather in person, we are prepared to offer housing assistance and short-term case management virtually. Virtual services will remain an option for Georgetown-area households who prefer to meet remotely during the grant term. Once in person services are deemed safe, we intend to speak with our local partners to secure space for face-to-face appointments for clients who prefer to meet in person. Public transportation access will be considered when confirming a location.

Proposed Program Details

Description of Proposed Program*

Describe the program for which you are requesting funding and the issue it seeks to address. Explain how you determined the Georgetown community's need for this program. Detail the strategies, resources, capacities, and connections that support your progress toward the program's identified goals. Provide evidence to support the strategies you employ within the program that reinforce your organization's long-term goals, and cite whether such strategies have been proven effective by research (if needed, attach citations, research, and any additional information in the "Citations, Acknowledgement, & Assurance" section).

Summary Georgetown Health Foundation grant funds will provide 25 Georgetown-area households, who are ineligible for CARES Act relief, with up to three months of rental or mortgage assistance. By providing up to three months of rental or mortgage assistance, Catholic Charities will stabilize families' housing so that they can move toward full financial recovery. Assistance may go toward current balances or arrears as families work to recover from the widespread economic impact of COVID-19 and the Texas winter storm. Issue A 2019 Williamson County Community Health Needs Assessment identified lack of affordable and safe housing as a top health concern. (1) In the Georgetown zip codes of 78628 and 78633, more than 40% of renters spent 30% or more of their income on housing alone. For the 30,000 Georgetown ALICE households (Asset Limited, Income Constrained, Employed) who already struggle to make ends meet, bouncing back from a temporary loss of income will not be possible without assistance. (2) ALICE households are those that may be living above the poverty threshold and are employed but do not earn enough to meet their basic needs. Even with two income earners, ALICE households are frequently living paycheck to paycheck and are one crisis away from extreme financial hardship. ALICE households are especially vulnerable to economic struggles because of job loss, reduced wages, or illness due to COVID-19. Many workers from ALICE homes do not have an annual salary, adequate health care coverage, access to telecommuting or other benefits that may help them weather this crisis. (3) Strategies and Resources To implement a \$50,000 grant for housing assistance to Georgetown-area residents, CCCTX will:

- Offer services virtually to keep clients and staff safe from COVID-19 and to increase accessibility for individuals with transportation challenges.
- Provide up to three months of rental or mortgage assistance to 25 households residing in Georgetown or Georgetown ETJ zip codes of 78626, 78628, 78633, 78673, 78674, or 78634. We expect that zip codes 78626 and 78628 will be the most frequently served. Of the 68 households we have provided with utility assistance using a 2020 GHF COVID-19 Relief Fund grant, 43 households have been residents of 78626 and 78628.
- Restrict services to households who live at or below 200% of the federal poverty level and are ineligible for CARES Act relief.
- Conduct outreach to individuals ineligible for CARES Act relief through: referrals from our Immigration Legal Services program, The Caring Place, and St. Helen's Catholic Church; a press release to El Mundo and Univision 62; and social media, including Facebook ads. The grant will be managed by our Financial Stability program. Financial assistance will be administered by a Jesuit Volunteer Corps member under the supervision of the Financial Stability program manager. Jesuit Volunteer Corps places capable, young adults with direct service organizations that address social justice issues for a 1-year placement. Jesuit Volunteers (JV's) receive a modest cost of living stipend allowing us to increase impact for a small investment. We have been approved for a JV to begin August 2021. Georgetown residents requesting housing assistance will call our main office line and will receive a call back from the JV within 72 hours. Clients will scan and email or take photos of their eligibility documentation. We find that most clients own smart phones, and we can walk them through the process of sharing documents digitally. Documentation can be submitted by mail or in person for clients who do not have technology access. Case management services will be provided by phone or video conference. Financial assistance will be distributed remotely by communicating with landlords by phone and mailing checks directly to vendors. Capacities
- Prior to becoming Program Manager of Financial Stability in January 2021, Carol Brewer served as the Financial Stability Specialist for two years and a case manager for eight years. Carol will lead the grant project.
- In the spring of 2020, CCCTX completed a Relief in a State of Emergency (RISE) contract with the City of Austin to provide \$1.45 million in financial assistance to 694 Travis County residents ineligible for CARES Act assistance.
- Last fiscal year, our Financial Stability program assisted 3,022 individuals, administered \$1,236,352 in financial assistance, and 83% of households exited the program housing stable. Connections Catholic Charities receives referrals from our Georgetown-area community partners such as The Caring Place and the Society of St. Vincent de Paul at St. Helen's Catholic Church. We regularly share information on Catholic Charities services and eligibility requirements with local agencies to facilitate good referrals and promote stewardship of each organization's resources. We also publish an updated list of resources on our website.

Proposed Impact*

How does this program prevent/eliminate/reduce the issue OR educate/rehabilitate/maintain a person affected by the issue?

Since 2006, our Financial Stability program has worked to prevent homelessness in Central Texas. Our goal is to improve the well-being of Central Texas families so they can achieve their full potential. To holistically meet each household's needs, we offer personalized services, including housing stability support, financial empowerment and life skills courses, and connections to employment. We help families identify the strengths they already possess and opportunities for growth. Our community is stronger when our neighbors have a safe, stable home and employment that provides a living wage. Together with community partners, we work to build the well-being of families by equipping them with knowledge to effectively manage income and reduce risk through financial education; supporting families to achieve self-identified goals through personalized case management; and supporting families to reduce debt and improve credit. Our entire community is strengthened when families remain in their homes. For Central Texans to achieve their full potential, their basic needs, including shelter, must first be met. When families do not have to worry about eviction, it improves their ability to keep or find employment, remain healthy, and be contributing members of society. Once families have a strong foundation, they can better weather life's storms and achieve their goals related to saving, education, employment, health and more.

Goals

Grant Period: The grant period for all GHF Annual Grants is **July 1 - June 30**.

Number of Georgetown residents to be served by this grant*

63

INSTRUCTIONS: Input at least 1 and up to 3 goals that will be achieved through the funding of this proposal. The goal(s) should be attainable within the 12-month grant period.

GOAL 1*

What end result would this grant support?

To prevent homelessness and achieve housing stability for 25 Georgetown or Georgetown ETJ households.

Support for the Goal 1: Outcomes, Outputs, Tracking, Activities, Inputs*

Provide a logic model(s) through which you will achieve your goal(s). Organize the logic model for each goal as outlined below. Additional prompts are provided to guide your responses within each category.

Outcomes: *What result will show the accomplishment of the strategy? What impact do you anticipate will result from completion of the activities?*

Outputs: *What are the quantitative measures (# of participants, # of sessions held, # of encounters, etc.) that demonstrate progress?*

Tracking: *How will you measure your progress? What systems will you employ to assess the activities?*

Activities: *What activities will support the goal?*

Inputs: *What resources (human, financial, organization, etc.) will be committed to this goal?*

Outcomes: 65% of Georgetown/Georgetown ETJ households receiving services will achieve housing stability at program exit. Housing stability is measured at the time of program exit using a form to evaluate whether housing is predictable, affordable, sustainable, and safe. See Additional Information attachment. **Outputs:** 25 households served. \$45,000 in rental or mortgage assistance distributed. **Tracking:** Jesuit Volunteer Corps member will track households served, number of individuals per household, aid distributed, address, demographics, and client ID in an Excel spreadsheet. Data will be compiled by Financial Stability program manager. **Activities:** Case management, financial education, financial assistance, resources, and referrals. **Inputs:** Jesuit Volunteer Corps member, Financial Stability program manager, referrals to and from community partners, financial education tools, and Georgetown Health Foundation grant funding.

GOAL 2 (if applicable)

Support for the Goal 2: Outcomes, Outputs, Tracking, Activities, Inputs

Provide a logic model(s) through which you will achieve your goal(s). Organize the logic model for each goal as outlined below.

Outcomes:

Outputs:

Tracking:

Activities:

Inputs:

GOAL 3 (if applicable)

Support for the Goal 3: Outcomes, Outputs, Tracking, Activities, Inputs

Provide a logic model(s) through which you will achieve your goal(s). Organize the logic model for each goal as outlined below.

Outcomes:

Outputs:

Tracking:

Activities:

Inputs:

Your Goals and Organization's Strategic Plan*

Does your organization adhere to a strategic plan? If so, how do specific components of your strategic plan tie to the goals outlined in this section?

Catholic Charities underwent a strategic mapping process to focus on planning for the future growth of our agency. Together with community partners we identified Catholic Charities' key strengths and competitive advantages, with the goal of enhancing these strengths and building upon them. We identified our three biggest advantages—we are faith-driven, service-centered and community-focused. These three pillars guide the future direction of Catholic Charities and help us expand access to our services for all families living in poverty within our 25-county service region. Our grant project helps us achieve the identified strategic goals to be: - A faith-living organization that incorporates mission, vision, philosophy, and values into all we do. - An agency with life-changing services. - An agency with the breadth of services needed to address both rural and urban community needs. - An agency that leads the community in change to improve lives. - An agency that deeply involves the community in the mission of Catholic Charities. The

project will also contribute to the following key metrics that our strategy map requires we measure: - Percent of times Catholic Charities rises to the occasion in time of community need - Number of inter-agency referrals

Organizational Financials

Fiscal Year Start Date*

Please enter the start date of your current fiscal year

07/01/2020

Fiscal Year End Date*

Please enter the end date of your current fiscal year.

06/30/2021

What are your organization's cash reserves, i.e., days cash on hand?*

\$1,189,871.00

How many months could the organization operate at your continued budget level?*

2

UPLOAD: Balance Sheet for Prior Fiscal Year*

(PDF format)

CCCTX Balance Sheet FYE 2020.pdf

UPLOAD: Income Statement for Prior Fiscal Year*

(PDF format)

CCCTX Income Statement FYE 2020.pdf

UPLOAD: Actual vs. Budget Income Statement for the Prior Fiscal Year*

(PDF format)

CCCTX Actual vs. Budget Income Statement FYE 2020.pdf

UPLOAD: Current Year-to-Date Financials to include Balance Sheet and Income Statement.*

(PDF format)

February Financial Statements.pdf

UPLOAD: Year-to-Date Cash Flow Statement

If your organization generates a Cash Flow statement, upload it here in PDF format. If not, leave blank.

UPLOAD: Organization Budget for Proposed Fiscal Year, Related to the Grant Period*

(PDF format)

Organization Budget FY2021.pdf

Most Recent Organization Audit

If your organization completed an audit since your LOI submission, please upload the most recent audit here.

Sources of Organizational Support: Individual Donor Contributions*

Provide the total revenue from individual contributions and the total number of individual donors from the prior fiscal year (please do not disclose donor names).

CCCTX raised \$1,198,660 in revenue from 1,292 individual donors in fiscal year 2020.

Sources of Organizational Support: Top 5 Sources*

Provide your organization's top 5 sources of revenue from the prior fiscal year (PFY) and the amount (e.g., Texas Health & Human Services contract, \$250,000).

City of Austin, Austin Public Health \$1,733,289 Diocese of Austin \$1,058,929 Anonymous Family Foundation \$750,000 Texas Pregnancy Care Network \$249,834 U.S. Citizenship & Immigration Services \$122,669

Citations, Acknowledgement & Assurance

Additional Information and Research Citations (optional)

Upload any critical details about your organization or program(s) not already included within this application that will strengthen your case for funding (no marketing material, please). This attachment may also be used to cite any statistics/research, and to define key terms and/or acronyms.

Citations and Program Eval Tool.pdf

Acknowledging GHF*

Type your name and date in the space below to assure that if funded, the organization will acknowledge GHF on all related marketing materials, your website, social media, and in any other communications in which this program is promoted.

Suzanne Leggett, Chief Advancement Officer 4/8/21

Assurance*

Type your name and date in the space provided to assure that by submitting this application, you 1) confirm that the information herein is true and correct, 2) confirm that if funded, funds will be spent according to the budget listed in this application, and 3) confirm that the organization will submit interim and final reports as required.

Suzanne Leggett, Chief Advancement Officer 4/8/21

File Attachment Summary

Applicant File Uploads

- Board of Directors List.pdf
- CCCTX Balance Sheet FYE 2020.pdf
- CCCTX Income Statement FYE 2020.pdf
- CCCTX Actual vs. Budget Income Statement FYE 2020.pdf
- February Financial Statements.pdf
- Organization Budget FY2021.pdf
- Citations and Program Eval Tool.pdf



Board of Directors 2020-2021

Executive Committee of the Board of Directors			
<i>Name</i>	Place of Business	Home Address	Years with Organization
Eric Boyce <i>President</i>	CEO & Co-Founder – BKA Wealth Consulting, Inc.	132 Driftwood Dr. Cedar Park, TX 78613	3
Ron Gay <i>Vice President, Chair of Mission Effectiveness</i>	Registered Representative – IMS Securities	1106 Deacon Dr. College Station, TX 77845	3
Brad Heath <i>Treasurer, Chair of Finance</i>	CEO – VirTex Enterprises	9405 Prince William Austin, TX 78730	2
John James <i>Secretary, Chair of Development & Public Relations</i>	Community Organizer	2401 Silent Brook Trl. Round Rock, TX 78665	3
Tom Wong <i>Chair of Audit</i>	Owner – Fleet Street Properties, LLC	10619 Pluchea Cove Austin, Texas 78733	2
Board of Directors			
Mary Beth Koenig	Chief Financial Officer – Diocese of Austin	6225 Highway 290 East Austin, TX 78723	9*
Rev. Bruce Nieli	Missionary Priest – St. Austin Catholic Parish	2026 Guadalupe St. Austin, TX 78705	1
DeKarlos Blackmon	Secretariat Director of Life, Charity and Justice – Diocese of Austin	6225 Highway 290 East Austin, TX 78723	5*
Rev. Chris Downey	Priest – St. Joseph Catholic Church, Killeen	2903 E. Rancier Ave. Killeen, TX 76543	2
Deacon Bill Scarmardo	Owner – W C Scarmardo Architect	4250 PR 4013 Caldwell, TX 77836	2
Peggy Fernandes	Community Volunteer	719 Beardsley Lane Austin, TX 78746	2
Deacon Patrick O’Beirne	Senior Vice President – Frost Bank	11313 Pachea Trl. Austin, TX 78726	4
Michael Scarpato	Risk Manager – Diocese of Austin	20100 Farm Pond Lane Pflugerville, TX 78660	5
Chris Cantu	Financial Advisor – Edward Jones	1404 Huntington Trail Round Rock, TX 78664	5
Ted Smith	Partner – Cornell Smith Mierl Brutocao Burton, LLP	11107 Edgecomb Cove Austin, TX 78737	5
Dorothy Hargrave	Manager of Admissions – The Labouré Society	P.O. Box 20682 Waco, TX 76702	<1
Leah Esparza	Director of Advancement – St. Michael’s Catholic Academy	7201 Magenta Lane Austin, TX 78739	<1
Pat Macy	Retired Director of Social Justice Ministry – St. Austin Catholic Parish	416 Starview Lane Georgetown, TX 78628	<1

* Ex-Officio member – Does not roll off board per agency bylaws.

Board members are asked to support Catholic Charities annually at a self-determined level. In calendar year 2020, 100% of board members contributed to the mission of Catholic Charities.

CATHOLIC CHARITIES OF CENTRAL TEXAS, INC.
STATEMENTS OF FINANCIAL POSITION
JUNE 30, 2020 AND 2019

Assets:	<u>2020</u>	<u>2019</u>
Current Assets		
Cash	\$ 542,439	\$ 433,929
Money Market Cash Equivalents	252,045	596,287
Grants Receivable	744,309	239,130
Other Receivables	127,554	23,522
Prepaid Expenses	<u>62,850</u>	<u>28,378</u>
Total Current Assets	<u>1,729,197</u>	<u>1,321,246</u>
Vehicles and Equipment, Net of Accumulated Depreciation of \$45,602	<u>-</u>	<u>-</u>
Total Assets	<u><u>\$ 1,729,197</u></u>	<u><u>\$ 1,321,246</u></u>
 Liabilities:		
Current Liabilities		
Accounts Payable	\$ 47,108	\$ 9,203
Payroll Taxes and Benefits	256,369	227,272
Funds Held for Others	<u>13,694</u>	<u>-</u>
Total Current Liabilities	<u>317,171</u>	<u>236,475</u>
 Net Assets:		
Without Donor Restriction	415,864	348,999
With Donor Restriction	<u>996,162</u>	<u>735,772</u>
Total Net Assets	<u>1,412,026</u>	<u>1,084,771</u>
Total Liabilities and Net Assets	<u><u>\$ 1,729,197</u></u>	<u><u>\$ 1,321,246</u></u>

CATHOLIC CHARITIES OF CENTRAL TEXAS, INC.
STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2020

	Without Donor Restriction	With Donor Restriction	Total
Revenues:			
Diocesan Grants	\$ 691,085	\$ -	\$ 691,085
Foundation Grants	765,112	451,978	1,217,090
Governmental Grants	2,382,573	81,737	2,464,310
Special Collections	-	52,784	52,784
Contributions	639,267	174,790	814,057
Contributions - Special Events	384,603	-	384,603
In-Kind Contributions	315,060	-	315,060
Client Fees	528,621	-	528,621
Interest Income	6,312	-	6,312
Other	189,475	-	189,475
Total Revenues	<u>5,902,108</u>	<u>761,289</u>	<u>6,663,397</u>
Net Assets Released from Restrictions	<u>500,899</u>	<u>(500,899)</u>	<u>-</u>
Total Revenues and Net Assets Released from Restrictions	<u>6,403,007</u>	<u>260,390</u>	<u>6,663,397</u>
Expenses:			
Immigrant Legal Services	1,431,929	-	1,431,929
Parish Relations	208,936	-	208,936
Financial Stability	1,699,460	-	1,699,460
Gabriel Project Life Centers	452,317	-	452,317
Counseling Services	723,829	-	723,829
Disaster Response	779,388	-	779,388
St. Michael's Veteran's Services	151,522	-	151,522
Total Program Expenses	<u>5,447,381</u>	<u>-</u>	<u>5,447,381</u>
Management & General	86,300	-	86,300
Fundraising	802,461	-	802,461
Total Expenses	<u>6,336,142</u>	<u>-</u>	<u>6,336,142</u>
Change in Net Assets	66,865	260,390	327,255
Net Assets at Beginning of Year	<u>348,999</u>	<u>735,772</u>	<u>1,084,771</u>
Net Assets at End of Year	<u><u>\$ 415,864</u></u>	<u><u>\$ 996,162</u></u>	<u><u>\$ 1,412,026</u></u>



Catholic Charities of Central Texas
YTD Statement of Activities by Department
June 30, 2020
Fund 01

Name	Administration 1000	Advancement 1100	Parish Relations 1200	Counseling 1300	Financial Stability 1400	Life Center 1500	ILS 1600	Disaster 1700	St. Michael's Verteran's Svcs 1800	Totals Actual	Budget	Variance
Diocesan Support	392,520	44,647	12,756	48,336	55,195	35,080	86,605	12,756	3,189	691,085	784,501	(93,416)
Government Grants	-	-	-	37,807	1,286,859	241,033	296,295	435,265	122,597	2,419,856	1,796,103	623,753
Foundation Support	-	802,091	-	48,000	80,697	5,000	36,784	74,257	-	1,046,828	501,730	545,098
Public Support	90	1,020,200	-	1,080	2,500	-	-	-	-	1,023,870	1,414,297	(390,427)
Restricted Contributions Released	-	-	8,589	440	14,040	5,890	21,710	130,458	773	181,900	222,675	(40,775)
Program Revenue	-	40	-	120,454	-	-	408,127	-	-	528,621	770,383	(241,762)
In-Kind	-	-	9,437	88,728	47,094	62,156	91,249	11,566	4,831	315,060	315,060	-
Other	7,566	40,000	10,634	36,144	15,819	17,347	61,991	5,934	353	195,788	6,000	189,788
Total Revenue	400,175	1,906,978	41,416	380,988	1,502,204	366,506	1,002,761	670,236	131,743	6,403,007	5,810,749	592,258
Payroll	22,656	557,036	161,744	492,606	562,452	260,268	1,021,050	203,751	53,651	3,335,216	3,580,395	245,179
Occupancy & IT	6,330	27,787	16,260	147,777	89,327	96,201	174,094	26,163	11,000	594,939	570,164	(24,775)
Direct Client Aid	-	-	-	-	948,653	9,327	3,261	515,624	77,670	1,554,535	809,791	(744,744)
All Other Expenses	57,315	217,637	30,932	83,446	99,028	86,520	233,524	33,850	9,201	851,452	850,399	(1,053)
Total Expenses	86,300	802,461	208,936	723,829	1,699,460	452,317	1,431,929	779,388	151,522	6,336,142	5,810,749	(525,393)
Net Income	313,875	1,104,517	(167,520)	(342,841)	(197,256)	(85,811)	(429,168)	(109,152)	(19,779)	66,865	-	66,865

Balance Sheet

	June 30, 2020	June 30, 2019
Assets:		
Cash	794,484	1,030,216
Receivables	871,863	262,652
Prepaid	62,850	28,378
	<u>1,729,197</u>	<u>1,321,246</u>
Liabilities:		
Payables	303,476	236,475
Funds held	13,694	-
Other	-	-
	<u>317,171</u>	<u>236,475</u>
Net Assets:		
Unrestricted	313,444	311,474
Board Designated	102,421	37,525
Temporarily Restricted	996,162	735,772
	<u>1,412,026</u>	<u>1,084,770</u>
Total Liabilities and Net Assets	<u>1,729,197</u>	<u>1,321,246</u>

CATHOLIC CHARITIES OF CENTRAL TEXAS, INC.
STATEMENT OF ACTIVITIES
UNAUDITED FOR YEAR TO DATE ENDING FEBRUARY 2021

	<u>Unrestricted</u>	<u>Temporarily Restricted</u>	<u>Total</u>
Revenues:			
Diocesan Grants	\$ 452,216	\$ -	\$ 452,216
Foundation Grants	332,500	441,477	773,977
Governmental Grants	2,481,387	84,302	2,565,688
Special Collections	0	17,241	17,241
Contributions	404,568	96,140	500,708
Special Events	266,368	0	266,368
In Kind Contributions	210,040	0	210,040
Client Fees	314,178	0	314,178
Interest Income	715	0	715
Other	841	0	841
	<hr/>	<hr/>	<hr/>
Total Revenues	4,462,814	639,159	5,101,973
Net Assets Released from Restrictions	877,044	(877,044)	0
	<hr/>	<hr/>	<hr/>
Total Revenues and Net Assets Released from Restrictions	5,339,858	(237,885)	5,101,973
Expenses:			
Immigration Legal Services	949,986	0	949,986
Parish Relations	137,542	0	137,542
Financial Stability & Direct Client Aid	1,233,624	0	1,233,624
Gabriel Project Life Centers	329,358	0	329,358
Counseling Services	395,770	0	395,770
Disaster Relief	1,355,654	0	1,355,654
St. Michael's Veteran's Services	235,965	0	235,965
Total Program Expenses	4,637,899	0	4,637,899
	<hr/>	<hr/>	<hr/>
Management & General	52,347	0	52,347
Fundraising	482,927	0	482,927
	<hr/>	<hr/>	<hr/>
Total Expenses	5,173,173	0	5,173,173
Change in Net Assets	166,685	(237,885)	(71,200)
Net Assets at Beginning of Year	415,864	996,162	1,412,026
	<hr/>	<hr/>	<hr/>
Net Assets at End of Year	\$ 582,549	\$ 758,277	\$ 1,340,826
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

CATHOLIC CHARITIES OF CENTRAL TEXAS, INC.
STATEMENTS OF FINANCIAL POSITION
UNAUDITED FOR MONTH ENDING FEBRUARY 2021

Assets:

Current Assets

Cash	937,118
Money Market Cash Equivalents	252,753
Grants Receivable	323,356
Other Receivables	52,946
Prepaid Expenses	67,809

Vehicles and Equipment, Net of Accumulated	0
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Total Assets	1,633,982
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Liabilities:

Current Liabilities

Accounts Payable	61,793
Payroll Taxes and Benefits	217,669
Funds Held for Others	13,694

Total Current Liabilities	293,156
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Net Assets:

Unrestricted	582,549
Temporarily Restricted	758,277

Total Net Assets	1,340,826
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Total Liabilities and Net Assets	1,633,982
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Organizational Budget
July 1, 2020 – June 30, 2021

Revenue:

Diocesan Grant	771,099
Governmental Grants	2,982,171
Foundation Support	1,042,071
Public Support	1,100,000
Restricted Contributions Released	194,012
Program Revenue	572,097
In Kind Contributions	315,376
Other	6,000
Total Revenue	6,982,826

Expenses:

Payroll	3,595,986
Facilities Maintenance	123,130
Furniture, Equipment, and Equipment Maintenance	123,027
Professional Services	440,281
Contract Services	45,301
Conference and Travel	35,950
Dues and Subscriptions	8,264
Telephone	35,515
Special Programs & Events	25,423
Program Materials	25,090
Publicity	3,570
Office Supplies	16,426
Postage and Shipping	13,555
Printing	36,043
Meetings and Hospitality	6,995
Direct Client Aid	1,921,623
Bank Fees & Service Charges	23,639
Rent and Utilities	105,633
In-Kind Rent	315,376
Miscellaneous	81,999
Total Expenses	6,982,826



The organization budget for July 1, 2021 – June 30, 2022 is in development and will be available by 5/31/21. We would be pleased to share the budget at that time. Please contact Annie Chavez at annie-chavez@ccctx.org for a copy.

References

1. Community Health Assessment 2019, Williamson County and Cities Health District (WCCHD) et.al. retrieved from <https://gthf.org/wp-content/uploads/2020/01/CHNA-Williamson-County-2019.pdf>
2. Alice in Williamson County. Retrieved from https://www.unitedway-wc.org/sites/unitedway-wc.org/files/Williamson%20County%20ALICE_AllTowns.pdf.
3. United for ALICE. “COVID-19 and ALICE: Understanding the Impact on America’s ALICE Families.” Retrieved from: <https://www.unitedforalice.org/covid2019>

CCCTX FINANCIAL STABILITY PROGRAM

Housing Stability Assessment (Case Managed Clients Only)

Client Name: _____

Client ID #: _____

Document attempts to contact client below for exit, include date and method (ex: phone, mail, email)

	EXIT
Attempt #1	Date: Method:
Attempt #2	Date: Method:
Attempt #3	Date: Method:

ENTRY	EXIT
Staff: _____	Staff: _____
Date: _____	Date: _____
Were you able to reach the client? <input type="checkbox"/> Yes; client completed assessment	Were you able to reach the client? <input type="checkbox"/> Yes; client completed assessment <input type="checkbox"/> Yes; CM completed assessment <input type="checkbox"/> Yes; unable to complete assessment <input type="checkbox"/> No; CM completed assessment <input type="checkbox"/> No; unable to complete assessment
Client must complete entry assessment.	
Yes/No (Circle One)	Yes/No (Circle One)

For Housing
Stability,
answer
should be:

Question		Yes/No (Circle One)		Yes/No (Circle One)	
Do you have a signed lease/mortgage/ written housing agreement?	YES	YES	NO	YES	NO
Can you pay your mortgage, rent, and utilities and have enough money left over for basic needs (ex. clothing, medical costs, transportation)?	YES	YES	NO	YES	NO
Can you maintain your housing for the next six months?	YES	YES	NO	YES	NO
If no, please describe the <u>specific crisis</u> that threatens your housing.		Describe:		Describe:	
Is your housing physically safe and healthy?	YES	YES	NO	YES	NO
Are you safe with your current household members?	YES	YES	NO	YES	NO

HOUSING STABLE ACCORDING TO CLIENT?	YES	NO	N/A	YES	NO	N/A
HOUSING STABLE ACCORDING TO CASE MGR?	YES	NO	N/A	YES	NO	N/A
HOUSING STABLE?	YES	NO		YES	NO	