

## **Exhibit A – Program Description and Scope: Critical Needs Fund (CNF)**

### **History and Evolution of the Critical Needs Fund:**

United Way of Santa Barbara County (UWSBC), in partnership with other leaders in philanthropy, established the Critical Needs Fund (CNF) early in the COVID-19 pandemic to share knowledge, identify emergent community needs/gaps in service, and nurture collaborative investments and strategies between the local government, philanthropic, and nonprofit sectors. The CNF was initially engaged primarily with the County Public Health Department (PHD) as the lead County Department coordinating response efforts for this health-related crisis. As it became clear the pandemic's negative impacts extend well beyond just public health, United Way began to engage with other County departments to explore needs and responses focused on the pandemic's economic, social service, and basic human impacts, especially those affecting vulnerable and often isolated and underserved populations. The goal has been to advise philanthropic partners where their investments through the nonprofit sector and in collaboration with local government might be most effective to meet community needs and fill systemic gaps during times of community crisis.

### **Making the Critical Needs Fund Permanent**

Recognizing the unique value of the CNF model in times of community crisis, and with encouragement from leaders at the County of Santa Barbara, UWSBC has committed to making the CNF a permanent component of Santa Barbara County's system for preparing for, responding to, and recovering from disasters, threats, and emergencies. Moving forward, the primary focus of the CNF will be to aid the County's ongoing efforts to (1) prepare for disasters, threats, and emergencies; (2) support the County's, response, and recovery efforts; and (3) nurture effective strategies to meet community needs through collaboration and partnership between the government, philanthropic, and nonprofit sectors.

United Way will engage CNF funders who have expressed a desire to maintain and build on the strengths and relationships made possible through the expanding CNF model. United Way will support current and future CNF members in being active participants in the new all-hazards approach moving forward.

The Santa Barbara County Office of Emergency Management (SBCOEM) will serve as the primary County department engaged with UWSBC and the CNF on an ongoing basis, and the SBCOEM Director or a designee will serve as an active member of the CNF. This represents a shift from the past approach in which the CNF focused primarily on the public health related pandemic, to now focusing the CNF more broadly on all-hazards preparedness, response, and recovery. To support UWSBC's leadership of the CNF, SBCOEM will partner with UWSBC to integrate and align the CNF model into the County's broader efforts and systems focused on disasters, threats, and emergencies.

It is envisioned that in normal times the CNF will meet at least twice per year, with a particular focus on educating and training the CNF membership on the basic systems, best practices, and approaches to preparedness, response, and recovery. This will help the CNF and its members to be informed and prepared to play their most effective roles during times of community crisis – when the CNF will be fully activated.

United Way of Santa Barbara County will continue as the leader of the CNF by serving as the primary liaison with CNF members, coordinating meetings, conducting research and analysis when needed/as possible, engaging nonprofit partners when relevant, helping CNF members be ready to have informed discussions at meetings, and

conducting follow-up after meetings. When the CNF is activated, UWSBC will work with SBCOEM to identify issues and need areas that should be prioritized for discussion and planning.

When possible/relevant, UWSBC will also help facilitate the exploration and development of potential collaborative approaches to meeting community needs. In some cases, should CNF members choose to fund certain collaborative responses, UWSBC will help facilitate fundraising and grantmaking processes including potentially serving as the fiscal agent for CNF related initiatives, as has been past practice. It is understood that while funding from CNF members directly to County departments may be possible in rare cases, most philanthropic members of the CNF will primarily be interested in funding local nonprofit organizations to help meet County identified needs. Funding for these efforts might be provided to nonprofits directly or through UWSBC as a fiscal agent, both being effective approaches in past CNF-funded initiatives.

While the above description of the CNF provides definition of the model and goals generally, it is understood by UWSBC and the COUNTY that the new CNF model is one that will evolve in future months and years through this partnership and by engaging the CNF membership in the creative process as well. Additionally, it is recognized that disasters, threats, and emergencies come in different forms and create a variety of impacts, making flexibility and adaptation key to any successful CNF model in the future. To help guide this collaborative and generative process, each party agrees to the following as their key roles in supporting a strong CNF model moving forward:

United Way of Santa Barbara County will support a strong and effective CNF by:

- a) Building and maintaining the capacity and readiness of the CNF on an ongoing basis so it is able to effectively launch as a partner with the County at the time of a disaster or as agreed to by its members for preparedness efforts.
- b) Managing and/or supporting collaborative programs and strategies launched through the CNF.
- c) Engaging philanthropic partners (foundation, individuals, and business sector) on an ongoing basis in the CNF model and in collaborative efforts to support disaster, threat, and emergency preparedness, response, and recovery.
- d) Designating specific staff to serve as primary liaisons to the SBCOEM on behalf of UWSBC, including the potential assignment of UWSBC staff to the County EOC during activations.
- e) Serving as a convener of leaders from the government, philanthropic, nonprofit, and private sectors to develop collaborative models, strategies, and programs that fulfill unmet needs or address critical disaster readiness and resiliency gaps.
- f) Ensuring fairness, equity, and cultural and linguistic diversity and competency in the CNF model and in any investments or strategies it might promote.
- g) Fully activating and coordinating the CNF during times of community crisis and/or when requested by the SBCOEM, the County Emergency Operations Center (EOC) Management Section staff, or the County Executive Office.
- h) Supporting the County in communications, outreach, and engagement to the broader community, and especially with populations that are vulnerable to, and/or who have been directly affected by disasters, threats, and emergencies.

The County Office of Emergency Management will support an effective CNF by:

- a. Designating key staff from the SBCOEM to serve as primary liaisons to UWSBC and as member(s) of the CNF on an ongoing basis, as well as devoting the staff time and resources necessary to ensure the relationship between SBCOEM and UWSBC remains strong and active.

- b. Ensuring that when a disaster (declared or otherwise) occurs that could lead to losses for individuals/households, the Santa Barbara County EOC Operational Area (OA) Liaison Officer, SBCOEM Duty Officer or other designated EOC Management Section leader will contact leadership at UWSBC to request activation of the CNF. Notifications should be sent to: Steve Ortiz, UWSBC President & CEO at 805-252-6555 or [sortiz@unitedwaysb.org](mailto:sortiz@unitedwaysb.org) and/or Melinda Cabrera, Vice President, Strategic Partnerships, 760-265-0968 or [mcabrera@unitedwaysb.org](mailto:mcabrera@unitedwaysb.org). In the event UWSBC leadership named in this Agreement will not be available, UWSBC will identify day-to-day and disaster response liaisons with 24/7 contact information.
- c. Working actively with UWSBC in the development of the CNF model going forward, including processes and systems to ensure the effectiveness of the CNF as a resource to SBCOEM and the County.
- d. Working with UWSBC to establish processes and procedures at the County and within the EOC addressing how and when the CNF might be fully activated in times of disaster, threat, or emergency.
- e. Integrating information regarding the CNF in the SBCOEM's Emergency Operations Plan, other relevant manuals and documents, and trainings; to include the process through which the County requests activation of the CNF and the roles SBCOEM and other County departments might play in helping advise UWSBC about programmatic model, priorities, and eligibility requirements for each incident.
- f. Assisting UWSBC in the development of trainings and materials and participating in CNF meetings to help educate CNF members about best practices in disaster preparedness, response, and recovery.
- g. When requesting CNF to target unmet needs and gaps, providing a written summary of the request, including any supporting documentation; best practices; local, state, and federal data; and other information germane to the request; being available to support UWSBC in further information gathering, research, and analysis; and being engaged and available for any follow-up meetings and inquiries.
- h. When relevant based on the disaster and its impacts, serving as a liaison to, and helping to actively engage, other County departments in CNF meetings and discussions to more fully identify emergent needs and gaps in community services.
- i. Educating County leaders about the CNF model to ensure County Department understanding of CNF's role in disasters and how to engage the CNF in potential partnerships and collaborations.
- j. Including UWSBC staff in relevant SBCOEM trainings, exercises, and planning activities in order to prepare UWSBC for effectively serving in a liaison role when requested and to support ongoing program readiness.
- k. Engaging in ongoing communication with UWSBC, including planning meetings as necessary, to identify evolving needs of the County to inform UWSBC how the CNF can effectively engage, respond, and support County priorities and community needs.