Unpacking the ConnectHomeUSA Toolbox
Part I

Introduction

- Welcome
- Purpose of this Webinar Series
- ConnectHomeUSA Playbook
- Today's Agenda:
  - ➢ Launchpad Toolkit
  - ➢ Convening Toolkit
  - ➢ Action Plan Toolkit
  - ➢ Partnership Building Toolkit
  - ➢ Funding Strategies Toolkit

Questions? Email: connecthome@hud.gov

The ConnectHomeUSA Program

Link to website:
https://www.hudexchange.info/programs/connecthomeusa/playbook-toolkits-and-guides/

The Launchpad Toolkit

Launchpad Toolkit

HUD EXCHANGE

Programs ⌄   Resources ⌄   Trainings ⌄   Program Support ⌄   Grantees ⌄   News

Tools and Templates

ConnectHomeUSA Launchpad Toolkit
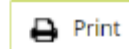
🖨 Print   ◁ ShareThis

Date Published: July 2022

Description

The Launchpad Toolkit complements the ConnectHomeUSA Playbook (Chapters 1-5) by providing more in-depth information around the topics that are key to helping communities get their ConnectHomeUSA programs off the ground.

Topics include:

- Understanding your community's needs
- In-depth guidance for administering a baseline survey

The toolkit also contains a sample survey and a Core Planning Team Mapping Worksheet to help build a core team.

View the ConnectHomeUSA Playbook Toolkits and Guides page for the full collection of resources to help ConnectHomeUSA staff establish a comprehensive digital inclusion program in HUD-assisted communities.

Resource Links

- Launchpad Toolkit Checklist (PDF)
- Core Planning Team Mapping Worksheet - PDF (PDF)
- Core Planning Team Mapping Worksheet - Word (DOCX)

Author Organization
HUD

Resource Approver
HUD Approved

ConnectHomeUSA

Link to toolkit: [ConnectHome USA Launchpad Toolkit - HUD Exchange](#)

Link to ConnectHomeUSA Landing Page: [ConnectHome USA Playbook Toolkits and Guides - HUD Exchange](#)

ConnectHomeUSA

Launchpad Toolkit Checklist

The Launchpad section of the ConnectHomeUSA Playbook (Chapters 1-5) should be your go-to resource for helping you begin putting your ConnectHomeUSA program into place. This toolkit is a companion piece which will help you operationalize these chapters and help you build a strong foundation for a successful program.

This document is divided into the following sections and companion materials:

- Section I: Introduction
- Section II: Building Your Team
- Section III: Understanding Your Community's Needs and Administering a Baseline Survey
- Appendix I: Sample Baseline Survey Questions Core Planning Team Mapping Worksheet (Available on HUD Exchange)

In addition to this toolkit, check out the other toolkits developed to complement other sections of the ConnectHomeUSA Playbook:

- Media Guide and Toolkit
- Organizing a Local Convening
- Developing Your Action Plan
- Fundraising Strategies
- Partnership Building
- Virtual Event Planning
- Digital Literacy Resource Guide
- Resident Engagement

We recommend using each of these to help you plan your ConnectHomeUSA program every step of the way!

U.S. Department of Housing and Urban Development | www.hud.gov/connecthomeusa

ConnectHomeUSA

6
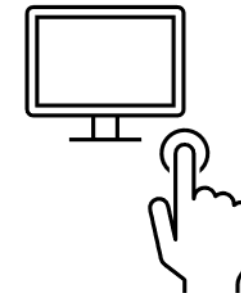
Core Planning Team Mapping Worksheet

Some questions to ask when setting up your Core Planning Team:

- Who from your organization should be involved?

- Which other organizations would be strong partners on the Core Planning Team?

Partner Type	Organization Type	Name	Title	Planning Team Role (identify quarterback organization & individual)
External	Local Elected Officials and City Leadership			
	Key City Staff			
	City CIO or CTO			
	Leaders from Key Community Organizations			
	Local Library Partners			
	Local Internet Service Providers			
	Funding Partners (foundations, banks, philanthropy)			
	Education Partners (schools, community college, universities)			
	Local Digital Literacy Providers			
	Local Device Providers and Refurbishers			
	Local Technology and Digital Inclusion Advocates			
	Local employers			
	Hospitals			
Internal	PHA Executive Director			
	PHA ConnectHomeUSA Lead			
	Resident Services Staff			
	IT Department Staff			
	Public housing and/or voucher Staff			
	Communications Staff			
	Resident Leaders			

ConnectHomeUSA

Link to Worksheet: ConnectHomeUSA Playbook Core Planning Team Mapping Worksheet (hudexchange.info)

Core Planning Team Mapping Worksheet

Partner Type	Organization Type	Name	Title	Planning Team Role (identify quarterback organization & individual)
External	Local Elected Officials and City Leadership			
	Key City Staff			
	City CIO or CTO			
	Leaders from Key Community Organizations			
	Local Library Partners			
	Local Internet Service Providers	Sarah	Library Staff	Digital Literacy
	Funding Partners (foundations, banks, philanthropy)			
	Education Partners (schools, community college, universities)			
	Local Digital Literacy Providers			
	Local Device Providers and Refurbishers	John	Comcast Employee	Devices
	Local Technology and Digital Inclusion Advocates			
	Local employers			
	Hospitals			
Internal	PHA Executive Director			
	PHA ConnectHomeUSA Lead			
	Resident Services Staff	Jane	Exec. Director	Quarterback
	IT Department Staff			
	Public housing and/or voucher Staff			
	Communications Staff			
	Resident Leaders			

Link to Worksheet: ConnectHomeUSA Playbook Core Planning Team Mapping Worksheet (hudexchange.info)

ConnectHomeUSA

Checklist Highlight: Needs and Administering a Baseline Survey

1. Population and Metrics
2. Survey Sample
3. Survey Design
4. Survey Distribution
5. Survey Analysis

![ConnectHomeUSA logo]

Appendix I – Sample Survey Questions

Below is a sample survey that HUD used to develop a baseline level of information at the start of the ConnectHome pilot program in 2015. You will notice the questions are short, use simple and precise language, and the overall survey is just a few questions. The results of HUD's study using this baseline survey tool can be found here: **https://www.huduser.gov/portal/connect-home.html**
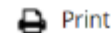
Do you (or anyone living in your household) have Internet access in your home (including by smart phone)?

☐ Yes ☐ No

If Yes	If No
How do you (or anyone living in your household) access the Internet in your home? *Please check all that apply.* ☐ Through a high-speed Internet subscription (for example: Comcast, Cox, AT&T, Verizon, CenturyLink, Charter) Who is your provider? _____ ☐ Through a smartphone data plan (for example: Sprint, Verizon, AT&T, T-Mobile) Who is your provider? _____ ☐ Through a dial-up connection ☐ Through WiFi based outside of your home (for example: public access or from a neighbor) ☐ Other: _____	**If you don't have Internet access in your home, what are the reasons?** *Please check all that apply.* ☐ Cost for Internet access ☐ Cost for devices (desktop computers, laptops, etc.) ☐ My housing unit or building isn't wired for service ☐ Tried to sign up for service but couldn't ☐ Not comfortable using computers or Internet ☐ Not interested in using the Internet ☐ I access the Internet outside of my home ☐ Other: _____
Which devices do you (or anyone living in your household) use to access the Internet in your home? *Please check all that apply.* ☐ Smart phone ☐ Desktop computer ☐ Laptop, Notebook, or Netbook (for example: Chromebook, HP Mini, Macbook, Dell Inspiron) ☐ Tablet (for example: iPad, Samsung Galaxy Tab, Kindle Fire) ☐ Gaming console ☐ Smart TV or device that connects TV to the Internet ☐ Other: _____	**If you don't currently have Internet access in your home, have you *ever* had Internet access in your home?** ☐ Yes ☐ No

Have you heard of ConnectHome, a program that brings free or low cost in-home high-speed Internet to residents of public housing?

☐ Yes ☐ No ☐ I don't know

If you have Internet in your home, is it free or low-cost through ConnectHome?

☐ Yes ☐ No ☐ I don't know ☐ I don't have Internet

The Convening Toolkit

The Convening Toolkit

HUD EXCHANGE

Programs ⌄   Resources ⌄   Trainings ⌄   Program Support ⌄   Grantees ⌄   News

ConnectHomeUSA Convening Toolkit

🖨 Print   ◁ ShareThis

Date Published: July 2022

Description

Holding a convening early on in a ConnectHomeUSA program is a key strategy for building support for your program and informs the development of an Action Plan. Convenings give ConnectHomeUSA communities the opportunity to present their digital equity plans to existing and prospective partners, solicit feedback, and enlist support. Building off Chapter 4 of the Playbook, the Convening Toolkit provides planning guidance as well as templates to help you organize a successful event. It is recommended to first read the Convening Toolkit Checklist and then use the Project Plan Template to begin outlining a plan.

Additionally, the Run-of-Show Template is designed to help keep important information for the big day all in one place. The Commitment Form Template can be used to ask attendees to commit support for your program.

If you decide to organize a virtual event, view the Virtual Event Planning Toolkit as well.

View the ConnectHomeUSA Playbook Toolkits and Guides page for the full collection of resources to help ConnectHomeUSA staff establish a comprehensive digital inclusion program in HUD-assisted communities.

Author Organization
HUD

Resource Approver
HUD Approved

Resource Links

- Convening Toolkit Checklist (PDF)
- Project Plan Template (DOCX)
- Run-of-Show Example - Excel (XLSX)
- Run-of-Show Example - PDF (PDF)
- Commitment Form Template - PDF (PDF)
- Commitment Form Template - Word (DOCX)

ConnectHomeUSA

11

Convening Planning Toolkit

Convening your existing and potential stakeholders is a critical first step to successfully narrowing the digital divide in your community. It is also a great way to introduce yourself to community groups you may not have worked with and establish ways in which you might be able to collaborate. See *Playbook Chapter 4: Organizing a Local Convening* for more information.

Ultimately, your convening allows you to present your ConnectHomeUSA goals and engage key community organizations, existing partners, and your residents in the process of developing your Action Plan. See *Playbook Chapter 4: Organizing a Local Convening* for more information.

U.S. Department of Housing and Urban Development | www.hud.gov/connecthomeusa

Checklist Highlight: Invitation List and Location Choice

Develop Invitation List

During the Launch Plan process, you should have created a list of potential stakeholders. Invite them to your convening and while you are at it, ask them to invite other organizations they work with that could be interested in supporting your ConnectHomeUSA efforts.

Potential Invitees

RESIDENTS
→ Resident groups and leadership

GOVERNMENT
→ State and local elected officials
→ Public housing agency leadership and staff
→ HUD staff
→ Libraries
→ School districts
→ City agencies, such as economic development departments

BUSINESSES AND NONPROFITS
→ Internet Service Providers
→ National ConnectHomeUSA stakeholders
→ Device providers and refurbishers
→ Technology community
→ Local media
→ Local banks
→ Local educational, or other service-oriented nonprofits (e.g. women's organizations)
→ Local businesses and employers
→ Owners of HUD-assisted multifamily properties
→ Colleges and universities

FUNDERS
→ Prominent foundations, your community foundation and other local funders

Location is IMPORTANT
- A central location with convenient access to public transport
- A neutral location
- Include stakeholders
- Ensure necessary resources to host a meeting are available
- Ensure accessibility of location
- Arrange transportation
- Consider a virtual meeting

ConnectHomeUSA

Checklist Highlight: Setting your Agenda

Set your Agenda

-What key topics do you want to hit?

-Refer back to your goals for the Convening and your Launchpad Plan to make sure that your agenda reflects your Core Planning Team's agreed-upon topics.

-Plan breakout sessions that address the three-legs of the digital inclusion stool and any other quality-of-life goals your initiative may have.

Develop Convening Activities

- Organize activities to build relationships between stakeholders

-Provide space to share ideas and potential action items to address the digital divide

ConnectHomeUSA

ConnectHomeTucson Convening Agenda

March 25, 2021 | 9:00 - 11:00 a.m.

Time	Session
9:00 am - 9:10 a.m.	**Welcome and Introductions** - Vice Mayor Nikki Lee
9:10 am - 9:15 a.m.	**What is ConnectHomeUSA?** - Lacia Sommars
9:15 am - 9:25 a.m.	**ConnectHome in Tucson** - Liz Morales
9:25 am - 9:40 a.m.	**Digital Inclusion Best Practices** - Mick Salik and Jared Frank
9:40 am - 9:45 a.m.	**Breakout Session Intro** - Alison Miller
9:45 am - 10:10 a.m.	**Breakout #1: Definition and Goals** - Facilitators
10:10 am - 10:15 a.m.	**Break/Session #1 Intro** - Alison Miller
10:15 am - 10:40 a.m.	**Breakout #2: Resources and Next Steps** - Facilitators
10:40 am - 11:00 a.m.	**Report out and Close**

The Convening Project Plan Template

STEPS	LEAD	TARGET START DATE	TARGET COMPLETION DATE	RESOURCES AND SUPPORT		BARRIER/CHALLENGE	STATUS UPDATE
What needs to be done to accomplish each goal?	Who will lead this step?	When will work on this task begin?	What is the target date that each task will be completed?	Resources Available	Resources Needed	What potential barriers do you foresee? How can you address them?	Are you on track to meet your completion deadline? What updates do you have?
Identify Convening Goals							
Action Item 1							
Action Item 2							
Action item 3							

Link to Worksheet: ConnectHomeUSA USA-Playbook-Convening-Project-Plan-Template.docx (live.com)

ConnectHomeUSA

The Convening Project Plan Template

STEPS	LEAD	TARGET START DATE	TARGET COMPLETION DATE	RESOURCES AND SUPPORT		BARRIER/CHALLENGE	STATUS UPDATE
What needs to be done to accomplish each goal?	Who will lead this step?	When will work on this task begin?	What is the target date that each task will be completed?	Resources Available	Resources Needed	What potential barriers do you foresee? How can you address them?	Are you on track to meet your completion deadline? What updates do you have?
Identify Convening Goals							
Action Item 1							
Action Item 2							
Action item 3							
Outline Key Activities and Dates							
Action Item 1							
Action Item 2							
Action Item 3							
Develop Invitation List							
Action Item 1							
Action item 2							
Action item 3							

Link to Worksheet: ConnectHomeUSA USA-Playbook-Convening-Project-Plan-Template.docx (live.com)

ConnectHomeUSA

The Commitment Form

I. Organization Information

Organization Name:			
Organization URL:			
Street Address:			
City:	State:	Zip Code:	

*Attach Organization Logo (Please attach a high-resolution version.) Your logo may be used on our ConnectHomeUSA materials both written and digital.

Agency Contact: *Who will serve as your organization's designated representative to ConnectHomeUSA? This should be an individual within your organization who will be knowledgeable about the work related to your proposed commitment(s) and has a leadership role in your organization.*

Name:	
Title:	
Email Address:	
Phone Number:	

III. Commitment Type

a. Under which category or categories will your commitment fall:
- ☐ Cash
- ☐ In-kind

IV. General Terms of Agreement

- All parties concur that this agreement is wholly voluntary and may be terminated by any party, at any time, and for any reason, with no penalty.
- The undersigned Partner Organization understands its participation in [INSERT PHA's NAME] ConnectHomeUSA program does not constitute an endorsement by the Federal Government or by [INSERT PHA's NAME].
- The undersigned Partner will not construe, claim, or imply that its participation in ConnectHomeUSA constitutes Federal Government approval, acceptance, or endorsement of anything other than Partner's commitment to the program.
- The undersigned Partner understands that the activities it undertakes in connection with ConnectHomeUSA are voluntary and not intended to provide services to the Federal Government. The undersigned Partner will not submit a claim for compensation to any federal agency.
- [INSERT PHA's NAME] will honor all requests to keep Partner's information and data confidential.

II. Commitment Category

a. Under which category or categories will your commitment fall:
- ☐ Digital Literacy
- ☐ Devices
- ☐ Connectivity
- ☐ Other (please specify below)

b. What is your commitment? If possible, please also express your commitment in a numerical form (i.e. number of hours, or number of slots, etc.).

My organization will...

c. Tell us more! Please explain your commitment in greater depth, including how you plan to accomplish it, and the results you expect to achieve. This commitment may include activities and programs that are underway that align with the category you will be contributing to.

d. If possible, describe the planned milestones you will track to measure progress.

17

Run-of-the-Show Template

Excel	ConnectHomeUSA-Playbook-Run-of-Show-Example - Saved ⌄		Search (Alt + Q)		

File Home Insert Draw Page Layout Formulas Data Review View Help 🔍 Viewing ⌄

	A	B	C	D	E
1			**RUN-OF-SHOW SHEET**		
2	Time	Location	Activity	Responsibility	Notes
3			Venue Access		
4			Bump In		
5			Catering Arrival		
6			Entertainment/Speaker arrival		
7			Start		
8			Official Welcome		
9			Presentation 1		
10			Breakout Session 1		
11			Presentation 2		
12			Breakout Session 2		
13			Evaluation Time		
14			Closing Remarks		
15			Event Breakdown		

ConnectHomeUSA

Link to Worksheet: ConnectHomeUSA Playbook Run of Show Example (hudexchange.info)

CONTACTS AND DETAILS

Convening Name				
Convening Date				
Times				
Attendance information				

VENUE

Venue Name	Address	Contact	Phone	Email

VENUE CONSIDERATIONS

Access Information	
Floorplan	
Parking	
Internet/Wi-Fi Information	

HOUSING AUTHORITY STAFF CONTACT INFORMATION

Contact Name	Role	Phone	Email

OTHER KEY CONTACTS

Position	Contact Name	Company Name	Phone	Email
Venue Manager				
Catering/Refreshments Contact				
MC				
Keynote Speaker				
Entertainment				
Audio Visual				
Transportation				
Photographer				
Media Contacts				

PRESENTERS AND SPEAKER CONTACT INFO

Name	Organization	Phone	Email

ConnectHomeUSA

Action Plan Toolkit

HUD EXCHANGE

Programs ⌄   Resources ⌄   Trainings ⌄   Program Support ⌄   Grantees ⌄   **News**

ConnectHomeUSA Action Plan Toolkit

🖶 Print   ◁ ShareThis

Date Published: July 2022

Description

The Action Plan Toolkit provides a detailed roadmap and timeline for achieving key milestones towards goals. The toolkit is a core component of ConnectHomeUSA programs and is a companion to Chapter 5 of the Playbook. It offers resources, tips, and a checklist to help ensure you're considering all the necessary elements that go into the development of an Action Plan. The toolkit also provides a timeline (See Launchpad to Action Plan Timeline and Template) to help stay on track and a downloadable Action Plan Template.

View the ConnectHomeUSA Playbook Toolkits and Guides page for the full collection of resources to help ConnectHomeUSA staff establish a comprehensive digital inclusion program in HUD-assisted communities.

Author Organization
HUD

Resource Approver
HUD Approved

Resource Links

- Action Plan Toolkit Checklist (PDF)
- Launchpad to Action Plan Timeline and Template (XLSX)
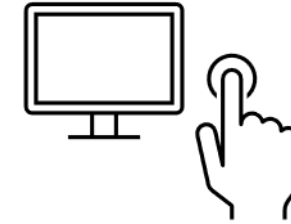- Action Plan Implementation Template (DOCX)

ConnectHomeUSA

The Launchpad to your Action Plan Template

The LAUNCHPAD to your Action Plan

TOPIC	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	Task Lead	Available Resources	Needed Resources	Available Partners	Needed Partners
Playbook 1: Getting Started	1A: Establish core planning team										
	1B: Review CHUSA stakeholder offers										
		1C: Map resources, gaps, and needs									
Playbook 2: Building Partnerships	2A: Identify existing partners										
	2B: Identify potential partners										
		2C: Create outreach strategy									
Playbook 3: Assessing your	3A: Identify exsiting data sources										
		3B: Determine best source of baseline									
			3C: Select target population and key							
Playbook 4: Organizing your Local	4A: Identify who should be there										
	4B: Identify host and location										
		4C: Set agenda									
		4D: Identify facilitators and									
			4E: Send invitations							
		4F: Confirm participants									
			4G: Hold your local							

Link to template ConnectHomeUSA-Playbook-Launchpad-Timeline-and-Template.xlsx (live.com)

Action Plan Implementation Template

Link to Worksheet: ConnectHomeUSA USA-Playbook-Implementation-Template.docx (live.com)

Action Plan Implementation Template

STEPS	LEAD	TARGET START DATE	TARGET COMPLETION DATE	RESOURCES AND SUPPORT		BARRIERS/CHALLENGES	STATUS UPDATE
What needs to be done to accomplish each goal.	*Who will lead each Action item?*	*When will work on this task begin?*	*What is the target date that each task will be completed?*	*Resources Available*	*Resources Needed*	*What potential barriers do you foresee? How can you address them?*	*Are you on track to meet your completion deadline? What updates do you have?*
Goal 1 Engage 100 new residents in digital literacy training	Sarah, Library Staff	March 1st, 2023	March 1st, 2024	-Library staff -Library computers -Library internet access	-Digital literacy curriculum -Extra devices -Marketing of literacy classes	-Lack of awareness of trainings	The staff that is willing to commit time to digital literacy training has been assembled. We are still waiting for participant confirmation.
Action Item 1 Market the digital literacy trainings to as many community residents as possible	Sarah, Library Staff	January 15th, 2023	March 1st, 2023	Funding to creating marketing materials	Assistance distributing marketing materials within the community	In order to prevent confusion or lack of awareness of digital literacy trainings, it will be important to implement a strong marketing technique	Marketing materials are currently in development.

Link to Worksheet: ConnectHomeUSA USA-Playbook-Implementation-Template.docx (live.com)

25

Partnership Building Toolkit

HUD EXCHANGE

Programs ⌄   Resources ⌄   Trainings ⌄   Program Support ⌄   Grantees ⌄   News

ConnectHomeUSA Partnership Building Toolkit

🖨 Print   ⬋ ShareThis

Date Published: July 2022

Author Organization
HUD

Resource Approver
HUD Approved

Description

Partners are key to running a successful ConnectHomeUSA program and closing the digital divide. The Partnership Building Toolkit provides tips and tools that can help build strong ties to existing partners and strategies to build new ones. It is recommended to start with the Partnership Building Checklist, followed by the Partner Communication Strategy Guide. Then, ConnectHomeUSA staff can view the Stakeholder Mapping Template to help them visualize their current and prospective partners.

The toolkit also includes a Partnership Inventory Worksheet to track partners around the three-legs of the digital inclusion stool (connectivity, devices, and training) and a Sample Memorandum of Understanding (MOU). Combined, these resources are designed to help staff develop a first-rate partnership-building strategy.

View the ConnectHomeUSA Playbook Toolkits and Guides page for the full collection of resources to help ConnectHomeUSA staff establish a comprehensive digital inclusion program in HUD-assisted communities.

Resource Links

- Partnership Building Checklist (PDF)
- Partner Communication Strategy Guide (PDF)
- Stakeholder Mapping Template (PDF)
- Partnership Inventory Worksheet (XLSX)
- Sample MOU (PDF)

ConnectHomeUSA

27

Partnership Building Toolkit and Checklist

This toolkit contains a checklist that provides steps, tips, and helpful resources for building successful partnerships to advance digital inclusion in your community. The checklist outlines action items to help you implement the partnership strategies highlighted in the ConnectHomeUSA Playbook. This toolkit also includes templates that can be downloaded and edited to include steps that are specific to your community and program.

The Checklist below can be used in conjunction with the following complementary documents in this toolkit:

- Stakeholder Mapping Template
- Partner Inventory Worksheet
- MOU Template
- Partner Communication Strategy Guide

U.S. Department of Housing and Urban Development | www.hud.gov/connecthomeusa

Checklist Highlight:

STEP 1: Define the Needs

STEP 2: Engage Existing Stakeholders and Partners

STEP 3: Identify Opportunities for New Partnerships

STEP 4: Establish Standards for Partner Engagement

STEP 5: Manage Partner Relationships

STEP 6: Expand Partnership Opportunities

ConnectHomeUSA

Partner Communication Strategy Guide:

ConnectHomeUSA

Takeaway: Manage Partner Relationships Through Effective Communication

Your partner communication strategy should clearly identify key points of contact within your partner organizations and each of their roles regarding communication activities. **The "RACI" framework** is useful for defining the roles of key participants in an activity or decision. The framework is described in the table below:

R – Responsible	These individuals are directly responsible for a particular activity or decision
A – Accountable	These individuals may or may not be directly responsible for an activity or decision, but they are ultimately accountable for the outcomes of that activity or decision
C – Consulted	These individuals should be consulted regarding a particular activity or decision
I – Informed	These individuals should be informed of a particular activity or decision

ConnectHomeUSA

Stakeholder Mapping Tool

Digital Inclusion Stakeholder Mapping Template

Internet service providers

Multifamily housing owners

Device providers

Private industry

Training providers

Schools and libraries

Residents and Families

Digital inclusion advocates

Colleges and universities

Funding organizations

Government

Resident groups

Local media
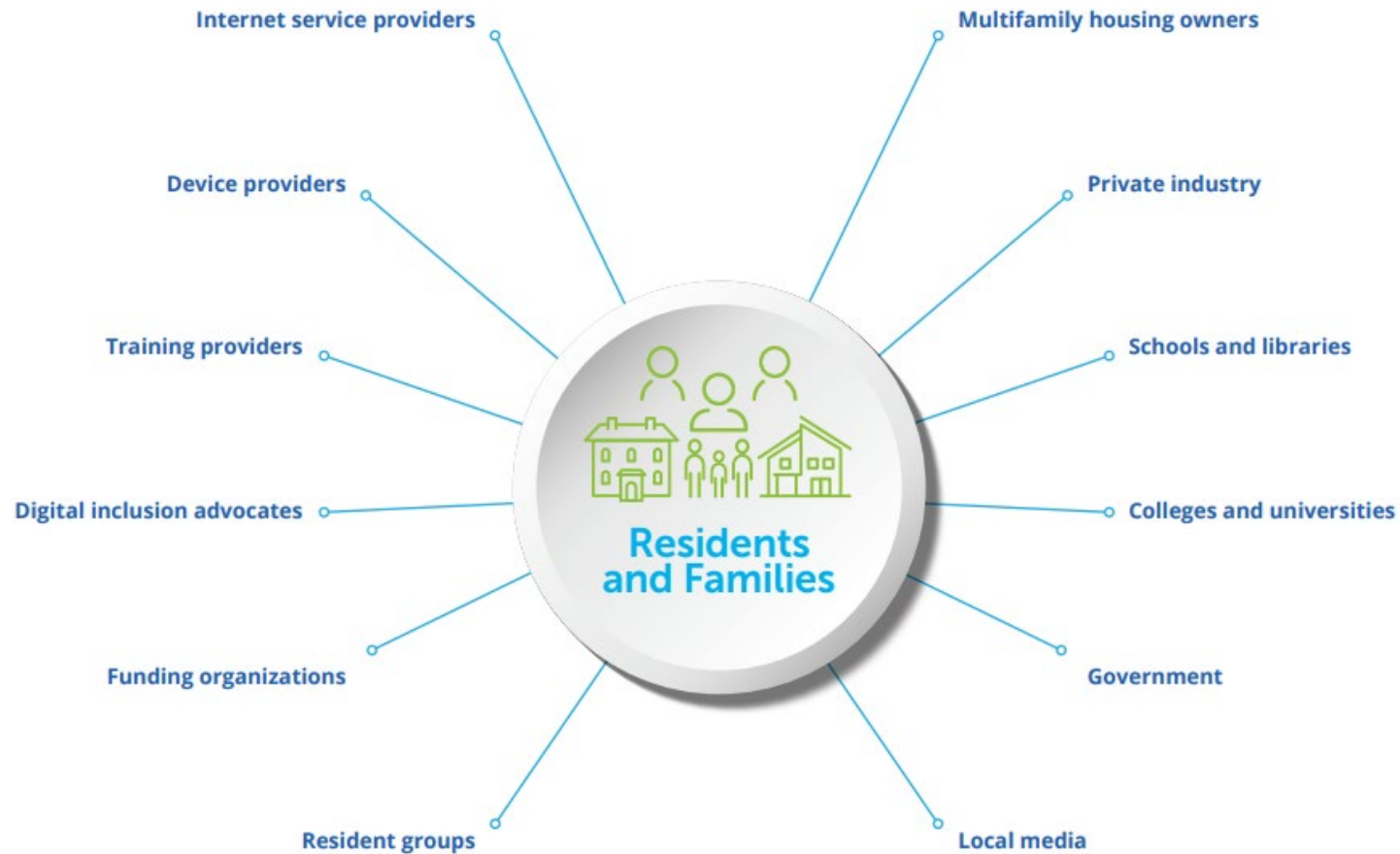
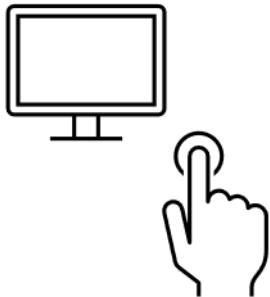Link to Worksheet: ConnectHomeUSA Playbook Partnership Building Stakeholder Mapping Template (hudexchange.info)

ConnectHomeUSA

Partnership Inventory Worksheet

Partnership Inventory Worksheet

#	Partner/Organization	Primary Point of Contact		Secondary Point of Contact		Role(s) - check boxes with 'X' to indicate roles					
CONNECTIVITY											
1		Name:		Name:		Expertise		Advocacy			Funding
		Phone:		Phone:		Internet Service		Devices/Equipment			Education/Training
		Email:	john.doe@email.org	Email:		Government/Policy		Engagement/Outreach			Stakeholder/Other
2		Name:		Name:		Expertise		Advocacy			Funding
		Phone:		Phone:		Internet Service		Devices/Equipment			Education/Training
		Email:		Email:		Government/Policy		Engagement/Outreach			Stakeholder/Other
3		Name:		Name:		Expertise		Advocacy			Funding
		Phone:		Phone:		Internet Service		Devices/Equipment			Education/Training
		Email:		Email:		Government/Policy		Engagement/Outreach			Stakeholder/Other
4		Name:		Name:		Expertise		Advocacy			Funding
		Phone:		Phone:		Internet Service		Devices/Equipment			Education/Training
		Email:		Email:		Government/Policy		Engagement/Outreach			Stakeholder/Other

ConnectHomeUSA

Link to Worksheet: ConnectHomeUSA-Playbook-Partnership-Inventory-Worksheet-Template.xlsx (live.com)

Sample MOU

SAMPLE MEMORANDUM OF UNDERSTANDING

Memorandum of Understanding between
[Organization 1], [Organization 2], and [Organization 3]

Background

[Description of issue or circumstance leading to the creation of the MOU]

Parties

The parties to this Memorandum of Understanding (MOU) include:

- [Organization 1 – description of organization]
- [Organization 2 – description of organization]
- [Organization 3 – description of organization]

Purpose and Goals

This MOU between the above-named parties is entered into for the purposes of [description of purpose].

All parties are interested in supporting the following specific goals:

- [Goal 1 – example: promoting resident access to affordable high-speed internet service]
- [Goal 2 – example: building digital literacy skills among residents]
- [Goal 3 – example: creating opportunities for educational advancement and employment]

Responsibilities of the Parties

The parties agree to undertake the following responsibilities to advance the goals outlined above. Specifically:

- [List of responsibilities of each party to achieve each goal identified above]
- [Organization 1 – description of responsibilities]
- [Organization 2 – description of responsibilities]
- [Organization 3 – description of responsibilities]

Expenses of Each Party

Each party to this MOU will bear its own expenses in connection with the responsibilities defined above and neither party shall be liable to another party for such expenses.

Measures of Success

- [List of measures of success for each goal identified]

Term

The effective date of this MOU is the date of the signature last affixed to this page and the MOU will be for [XX] months from this date.

This MOU can be terminated at any time for any reason, provided that one of the organizations notifies the other(s) within 30 days.

Statement of Non-Binding Obligation and No Financial Commitment

This MOU is an expression of intent only. Each of the parties to this MOU will act as an independent party with respect to the performance of its responsibilities under this MOU. This MOU does not obligate and will not result in an exchange between or among the parties of funds, personnel, property, services, or any kind of financial commitment. It will not result in a transfer of resources between the parties. Any future transfer of funds or obligation to undertake certain work must be confirmed by an appropriate funding agreement executed by authorized officials from the organizations that are signatories to this MOU. The MOU does not give any third party any benefit, legal, or equitable right, remedy, or claim under the MOU.

Signatures

This MOU may be executed in two or more counterparts, each of which together shall be deemed an original, but all of which together shall constitute one and the same instrument. Any signature delivered by electronic transmission in a .pdf data file shall have the same force and effect as though such signature page were an original page to this MOU.

[Organization 1, Representative Name and Title]

_____
Signature   Date

[Organization 2, Representative Name and Title]

_____
Signature   Date

[Organization 3, Representative Name and Title]

_____
Signature   Date

Link to Worksheet: ConnectHomeUSA Playbook Partnership Building Sample Memorandum of Understanding (hudexchange.info)

34

The Fundraising Strategies Toolkit

Fundraising Strategies

Programs ∨   Resources ∨   Trainings ∨   Program Support ∨   Grantees ∨

Home > Resources > ConnectHomeUSA Fundraising Strategies Toolkit

Tools and Templates

ConnectHomeUSA Fundraising Strategies Toolkit

🖨 Print   ◁ ShareThis

Date Published: July 2022

Description

Your ConnectHomeUSA community may have funds set aside to support your work, but it may not cover all that you want to accomplish. The Fundraising Strategies Toolkit covers the full landscape of funders, including local, national, private and government funders, as well as key terms used by funders. It also provides tips for assessing funding needs, resources for researching funders that can fill those needs, and best practices for applying for funding.

The toolkit also contains a guide to help develop a fundraising plan, as well as templates to help document strategies, fundraising plan, and associated budget. The Research Template for Prospective Funders will also help track research findings.

View the ConnectHomeUSA Playbook Toolkits and Guides page for the full collection of resources to help ConnectHomeUSA staff establish a comprehensive digital inclusion program in HUD-assisted communities.

Author Organization
HUD

Resource Approver
HUD Approved

Resource Links

- Fundraising Strategies Checklist (PDF)
- Research Template for Prospective Funders - Excel (XLSX)
- Research Template for Prospective Funders - PDF (PDF)

ConnectHomeUSA

ConnectHomeUSA

Fundraising Strategies Toolkit

This Toolkit will walk you through the key concepts necessary to develop an effective fundraising plan. It is divided into two sections: **Fundraising Strategies** and **Guide to Developing a Fundraising Plan**. It also includes Appendices* which contain templates to help put your fundraising strategies and plans together.

U.S. Department of Housing and Urban Development | www.hud.gov/connecthomeusa

ConnectHomeUSA

Checklist Highlight: Fundraising Strategies

5 Key steps for fundraising success

1. Conduct a needs assessment
2. Create a program budget and fundraising budget
3. Research potential funding sources
4. Develop your fundraising plan
5. Implement the fundraising plan

Helpful tip: Your program budget and fundraising budget should reflect the goals developed as a part of your ConnectHomeUSA Action Plan.

ConnectHomeUSA

Checklist Highlight: Fundraising Strategies

Three Key Strategies for Communicating with Funders:

1. Use a variety of outreach methods

2. Communicate your organization and program missions

3. Expand the funder network
   1. Foster existing relationships
   2. Funder Stewardship

Helpful tip: Telling your story from a resident's perspective can be a powerful way to get your message across. Remember to keep your message succinct.

ConnectHomeUSA

Stewardship Matrix

Key stewardship techniques include:

- Set aside time monthly for making thank you calls

- Invite donors to participate in ConnectHomeUSA activities

- Hold a special event to honor all donors

- Send handwritten cards on important dates

- Provide regular updates to funders about progress and areas of need so they are aware of additional contribution opportunities

- Develop a plan to maintain stewardship practices.

	Communication Method	Timeline	Federal Funds	State/Local Funds	Philanthropic Donors	Charitable Donors
Acknowledgement *Thank your donors upon receipt of gift.*	Ex: thank you email	Within 48 hours	✓	✓	✓	
Recognition *Express appreciation to donors.*						
Reporting *Communicating results back to donors.*						
Cultivation *Motivating donors for ongoing or increased giving.*						

Link to Worksheet:
ConnectHomeUSA Playbook Fundraising Strategies Toolkit (hudexchange.info)

ConnectHomeUSA

Guide to Developing a Fundraising Plan

U.S. Department of Housing and Urban Development | www.hud.gov/connecthomeusa | 16

Fundraising Strategies

ConnectHomeUSA

Part II: Guide to Developing a Fundraising Plan

A **Fundraising Plan** is a document that organizes and outlines fundraising activities over a certain period of time. The main components of a successful fundraising plan are:

Step 1: Identifying Potential Sources of Funds

Step 2: Setting a Fundraising Goal

Step 3: Selecting Fundraising Strategies

Step 4: Creating a Fundraising Budget

Communities should use the *Fundraising Plan Template* in this document to begin developing a Fundraising Plan and then develop a timeline associated with the plan. Consider adapting the *Action Plan Timeline* template for use here!

Checklist Highlight: Guide to Developing a Fundraising Plan

4 Key components for successful fundraising

Identify potential sources of funds

Set a fundraising goal

Select fundraising strategies

Create a fundraising budget

ConnectHomeUSA

Fundraising Plan Template

Fundraising Plan Template					
Activity	Available Capital Funds	Available Operating Funds	Other Available Funds	Total Amount Needed	Funding Needed (Gap)
Staffing					$
Community Outreach					$
Digital Literacy Training					$
Device Distribution					$
Connectivity					$
Travel					$
Marketing					$
Fundraising costs					$
Other					$
Total					$ Fundraising Goal

Link to Worksheet: ConnectHomeUSA Playbook Fundraising Strategies Toolkit (hudexchange.info)

ConnectHomeUSA

Fundraising Strategies Template

Fundraising Strategies Template		
Types of Fundraising Strategies	**Y or N**	**Notes**
Large fundraising event		
Networking		
Special Events		
Smaller online fundraising or crowdfunding campaigns		
Giving Days (i.e. Giving Tuesday)		
Recurring monthly donations		
Direct Mail		
Fundraising Calls		
Email Marketing		

ConnectHomeUSA

Link to Worksheet: ConnectHomeUSA Playbook Fundraising Strategies Toolkit (hudexchange.info)

Budget Template for Fundraising Activities

Budget Template for Fundraising Activities					
Types of Fundraising Strategies	Organization and Planning Time (Weeks)	Organization Staff Time	Estimated Cost	Estimated Revenue	ConnectHomeUSA Benefit (e.g. Devices)
Large fundraising event					
Special Events					
Smaller online fundraising or crowdfunding campaigns					
Giving Days (i.e. Giving Tuesday)					
Recurring monthly donations					
Direct Mail					
Fundraising Calls					
Email Marketing					

Link to Worksheet: ConnectHomeUSA Playbook Fundraising Strategies Toolkit (hudexchange.info)

Be sure to watch Part II of this webinar to learn more about the following kits and guides:

Media Guide and Toolkit

↓

Virtual Event Planning Toolkit

↓

Resident Engagement Best Practices Guide

↓

Coalition Building Best Practices Guide

↓

Digital Literacy Resource Guide

ConnectHomeUSA

Thank you!
Any questions?

Please contact:

connecthome@hud.gov

ConnectHomeUSA