

COVER SHEET 2017 GRANTS - ORRVILLE AREA UNITED WAY

AGENCY NAME: United Way of Wayne and Holmes Counties

Mission Statement: Mobilizing community resources to help people measurably improve their lives.

AGENCY DIRECTOR/PRESIDENT: Name: Todd Jasin

Telephone 330.264.5582 Fax E-Mail todd@uwwh.org

Board President: Name: Lisa Reichart

Address: 215 South Walnut Street City: Wooster E-Mail todd@uwwh.org

Compute your Agency's overhead using your most recent 990 using this formula

Add Management & General (Part IX, Line 25, Column C)		\$ 212,422
Fundraising (Column D)	+	\$109,897
	=	\$322,319
TOTAL		
Divide total by Part VIII, Line 12, Column A (Total Revenue)		_____ 22%

Program Funding Requests:

- | | |
|------------------------------|-----------------------------------|
| 1) United Way 2-1-1 | <i>New Request? No</i> |
| <i>Funded 2016 \$ 11,000</i> | <i>2017 Requested \$22,000.00</i> |
| 2) _____ | <i>New Request? _____</i> |
| <i>Funded 2016 \$ _____</i> | <i>2017 Requested \$ _____</i> |
| 3) _____ | <i>New Request? _____</i> |
| <i>Funded 2016 \$ _____</i> | <i>2017 Requested \$ _____</i> |
| 4) _____ | <i>New Request? _____</i> |
| <i>Funded 2016 \$ _____</i> | <i>2017 Requested \$ _____</i> |

\$ 22,000.00 Sum Total of all Dollars Requested for 2017

I affirm that I have reviewed this application for funding, and, to the best of my knowledge, confirm that the information presented here is a financially, statistically, and programmatically accurate representation of our agency.

Chief Professional Officer Signature

Lisa Reichart, Board President
Board President or Treasurer' Name (Please indicate which)

Date
Lisa K. Reichart
Board President or Treasurer's Signature

9/9/2016
Date

2017 Program Information

Please use a separate form for each program.

1. Agency: United Way of Wayne and Holmes Counties

2. Program Name: United Way 211

A. Based on the targeted outcomes of this program, from which of the following community impact areas are you requesting funding?

Nurturing Children & Youth

(Provides positive outcomes that help children and youth succeed in school and develop into successful adults)

Helping In Hard Times

(Provides emergency assistance: food, shelter, clothing, and legal help)

Developing Life Skills

(Provides positive outcomes with programs that enable individuals and families to become more emotionally, physically, and/or financially stable)

Promoting Health & Wellness

(Provides positive outcomes with programs that enable individuals and families to have access to prevention and/or treatment in the health arena, enabling them to become and/or stay healthier emotionally, physically, and/or financially)

B. Is this Program

New program

Expanded program

Continuation of a previously funded program

3. Please complete the following for each program:

<u>\$22,000</u>	+	46,061	=	68,061
Funds Requested From OAUW		Funds Requested/Received From Other Sources		Total Program Funds

4. If previously funded program, are you asking for increased dollars of support?

Yes No

5. If yes, why are you requesting more money?

The increased ask is due to the cost of business and the increase of the marketing effort of 2-1-1. United Way has conducted an intensive 2-1-1 marketing campaign which includes, public service announcements at the local movie theatre, billboard advertisements, door hangers, ads in the paper and social media ads.

6. If your program was not funded for the full amount you requested for 2016, what impact did this have on your program? What adaptations did you have to make?

If United Way 2-1-1 was not fully funded for 2016 we would have to reexamine services we offer in the community and make cuts to programs. The cuts may inhibit some services from achieving their full potential in the community. Funding cuts would also result in a decreased awareness of 2-1-1 services and could prevent and individual from receiving the services they may need.

7. How will the agency adapt this program next year if your requested funding level cannot be met or if a decision is made that the program will not be funded at all next year?

Again, we would have to look at programs and in-kind services we offer to the community and make cuts to said programs. We would have to cut in-kind assistance to community members who come into United Way offices for help. United Way of Wayne and Holmes Counties is one of the few remaining United Way for clients to come in and have United Way staff complete paperwork for clients who have literacy issues. If funding was unmet, we would have to drop this service for the community.

8. Please describe the fees and reimbursements associated with this program.

Fees: Services are completely free to all that call or walk in.

Sliding Fee Schedule:

Insurance Reimbursement: n/a

Government Subsidies: n/a

Community Impact

8. Describe the target population and eligibility requirements for the Program:

Our service population for United Way 2-1-1 is anyone that requires assistance or does not know where to turn for help. 2-1-1 is often the first contact someone in crisis dials for help. 2-1-1 is the first step to help stabilize the life for someone living in crisis. There only eligibility requirements for using the program are that clients must have a need for help.

9. What agencies or programs in the community provide similar services? Please be specific about how we can differentiate this program from others.

United Way 2-1-1 is the warehouse of information for resources and agencies in Wayne County. United Way 2-1-1 is the most current database of services and information in the county. The database is maintained with strict standards and always contains the most current information, so clients do not have to waste precious phone minutes calling multiple agencies with questions for help.

At 2-1-1 the information specialists are certified and have a goal to make sure that each caller is provided with at least three resources when available. Just sharing the name and phone number of an agency doesn't give a person the comprehensive information needed for a successful connection. The 2-1-1 data base proves the following on each available resource:

- Phone number
- Address
- Fax number
- Website and email addresses
- Contact names
- Hours of operation
- Details of services provided
- Eligibility requirements
- Documents necessary for assistance

Additionally, we still accept walk-in clients and are able to work one-on-one with clients to complete paperwork that they don't understand because of literacy issues. The fact that we can actually advocate on their behalf is yet another thing that sets us apart. We are one of the few sites that enable people to come in and meet face-to-face during normal business hours Monday – Friday from 8am – 5pm.

United Way 2-1-1 information specialists also have access to neighboring area counties: (Allen, Ashland, Belmont, Crawford, Geauga, Holmes, Huron, Lawrence, Marion, Medina, Portage, Van Wert, Wayne and Wyandot). Should you need help for yourself or a friend a service may be available in neighboring counties by accessing the 2-1-1 service from a free phone call, or the online resources.

Impact Analysis

10. Describe the targeted outcomes of this program. In other words, you ran this program, you gave clients certain skill sets, you increased their knowledge, and you treated their illness, which is all good. But how have you changed the lives of those people, and as a result, our community?

Please include the following information in your narrative *and limit this to 2 pages:*

- **Description of the activities and resources you use to accomplish these outcomes**

ACTIVITIES

- Create and maintain a comprehensive online, searchable information database
- Collect, analyze and report inquirer data
- Continually update information
- Manage complaints with service
- Produce and distribute directories
- Educate and promote United Way 2-1-1 information and referral service to local professionals and the community at large through outreach
- Provide information and referral to callers 24-hours a day, 7 days a week
- Advocate on behalf of inquires who need additional support and assistance
- Act as a portal of entry for service clubs, sending out their applications, reviewing them for completeness upon return, making sure they get referred to the appropriate service group for decision Ex: Lions Club, Wayne County Committee for Crippled Children and Adults, Quota Club
- Document new community resources
- Act as a reservation site for local events including, but not limited to, Senior Forum, Senior-a-Fair, VITA, health fairs
- Identify unmet and emerging needs
- Connect volunteers with community volunteer opportunities

Promotions

- Door hanger Campaign- Over 3,000 impressions
- Public Service Announcement in local movie theatres- Over 3,000 impressions

RESOURCES

- Computers
- Specialized information and referral software
- Searchable web-based database of software
- Telephones
- .5 FTE I & R specialist, Cleveland, .5 Resource Specialist Cleveland, 3 back-up local staffers
- Copier
- Binding machine
- Paper
- Toner-Ink
- Postage meter
- Financial and Management staff time

- **Information about the tools you use to measure outcomes**

Short Term Outcomes

Increased knowledge about solutions to issues occurs with 99% of most calls. Callers are encouraged to call back if problems are not resolved. Seldom does a caller call back with the same issues.

Long-Term Outcomes

With the use of internet, phone and face-to face communication our long term goal is to increase the knowledge of clients by providing them with new or improved information concerning the resources we have at the local, state, or national level.

We are able to review data from 2-1-1 and see what the most unmet needs in the community are. After analyzing the unmet needs in the community, United Way with community support is able to develop an action plan to address the unmet needs in the community.

- **Dialogue about the challenges you face in measuring the success of the program**

All 2-1-1 information and referral programs have to be accredited by AIRS (Alliance of Information and Referral Systems). Cleveland is required to meet a Code of Standards which requires follow up as a measurement of client satisfaction. Follow up with clients continues to be a challenge with this program due to the clients choosing to remain anonymous during the call. Referral specialists must obtain permission from the caller to follow up which presents barriers as well.

Follow up consists of successfully contacting the caller to find out if his need was met and if not, the reasons why not. Per AIRS Standards, follow up is generally conducted within one to three days of the original inquiry in cases of endangerment and within 7-14 days in other situations.

Information gathered from the follow up process is used to gather information about the effectiveness of community resources in the county. Our partnership with Cleveland binds us to their follow up quality control which uses the attached follow up criteria and is administered as follows: Customer Satisfaction Surveys must be sent to 10% of all callers; the results of the surveys and any secret shopper calls should show satisfaction with the service provided; follow up must be attempted on 3% of total calls.

- **Specific information about the recorded outcomes you achieved last year**

Increased knowledge occurs with 99% of all callers. However, knowledge alone does not always lead to a solution of their problems. For example, there was a great need for transportation assistance this year but there was not enough assistance from agencies and organizations to meet the demand for transportation assistance. Also, some agencies will only offer assistance once a month; this presents a problem for someone needs transportation on a weekly basis. While people in our community struggle with daily life emergencies, it is great to know that United Way 2-1-1 is there to be their support system.

- **Discussion of whether or not your outcomes met, exceeded or fell short of your desired outcomes**
- Our outcomes for increasing client knowledge of available resources have been met but solutions to community problems have been an issue due to limited funding from partner agencies in the communities. For example, a client may need help with rent assistance and then 2-1-1 referred the client to an agency that helps with that issue. Unfortunately for the client, the agency ran out of funding that quarter for assistance and they were not able to get the help they needed. Emergency services are always at a high need and also short on funding. We are getting the word out in the community about United Way 2-1-1 and providing the resources available to those in need of assistance.

Program Outputs

11. Define a unit of service. If it is not possible to define one unit, please state why.

Remember that whatever the method of measurement, you are consistent from year-to-year.

Unit of Service is an individual contact where either information or a referral is exchanged.

12. Complete the following if the agency is seeking United Way funding for this program.

Year	Number of Clients in zip codes 44667, 44618, 44645	Number of Clients in all of Wayne County	Clients on a Waiting List
2015 Actual	765	5,515 Calls 1,504 website visits 6,550 print	0
2016 Projected	850	5,560 Calls 1,700 website visits 6,650 Print	0
2017 Projected	900	5,590 Calls 2,000 website Visits 6,700 print	0

13. Unit Cost: Please explain changes either up or down in your cost.

Year	Individuals or Units of Service	Total Cost of Program	Unit Cost (Cost/Units)
2015 Actual	13,569	68,061.00	5.01
2016 Projected	13,910	72,734.00	5.22
2017 Projected	14,290	73,291.00	5.12

14. Individuals served

Last year (actual): 13,519
 This year (projected):20,601

Client Demographics

14.

	NUMBER
Types of Clients: Individuals	7,019
Information & Referral, Brochures	6,550
Organizations	275

PLEASE COMPLETE THE INFORMATION FOR INDIVIDUAL CLIENTS ONLY		
Age Group: Under 5		
6 thru 12		
13 thru 17		2.39 %
18 thru 34		17.79%
35 thru 54		.20.51%
55 thru 64		26.23%
65 thru 74		33.39%
75 thru 84		
85 and over		
Unknown		
TOTAL INDIVIDUALS:		100%*
Gender: Male		27.11%
Female		73.16%
Unknown		
TOTAL INDIVIDUALS:		100%

	NUMBER		NUMBER
Household Income:		Ethnic/Racial Background:	
\$0 thru \$11,999		White	
\$12,000 thru \$14,999		Black or African American	
\$15,000 thru \$24,999		Hispanic or Latino	
\$25,000 thru \$49,999		American Indian or Alaska Native	
\$50,000 thru \$74,999		Asian	
More than \$75,000		Native Hawaiian or Pacific Islander	
Unknown		Unknown	
TOTAL INDIVIDUALS:	N/A	TOTAL INDIVIDUALS:	N/A

*NOTE: All TOTALS should be the same number

Grants & Collaborations

Orrville Area United Way – Complete this form for each applicant program

Date: 9/9/2016

Agency: United Way of Wayne and Holmes Counties

Program: United Way 2-1-1

Please respond in writing to the following questions:

1. What would happen if your program were to disappear?

Clients would have to call various different agencies at various different times of day to get the help they need. Some clients would not be able to get the help they need due to the confusing nature of calling different social service agencies and using up precious phone minutes in the process.

2. What would happen if you were not to receive the requested amount?

If United Way 2-1-1 was not fully funded for 2016 we would have to reexamine services we offer in the community and make cuts to programs. The cuts may inhibit some services from achieving their full potential in the community. Funding cuts would also result in a decreased awareness of 2-1-1 services and could prevent an individual from receiving the services they may need.

3. Specifically, how would decreases in your grant impact your programming:

- a. 25% decrease?

Cuts would have to be made to walk in clients who may need assistance with paperwork due to literacy issues.

- b. 50% decrease?

Cuts would have to be made to walk services to the public, as well as the marketing and awareness campaign would have to be drastically reduced.

c. 75% decrease?

We would have to cease all promotion and outreach for the program.

4. What other organization/s provide/s the same or similar services/programs?

No other service or organization is able to offer the services that United Way 2-1-1 is offering in the community now. Agencies are able to refer and provide help on one specific issue but due to the nature of 2-1-1 and the vast library of resources it contains, no agency can make referrals to all sources.

5. Specifically, how are you collaborating with other agencies/organizations?

United Way 2-1-1 collaborates with all social service entities in Wayne County who offer services to the public. All new social service agencies are given a chance to join 2-1-1 as well.

6. What services/programs for which you are requesting support are complementary services in collaboration with other entities?

United Way 2-1-1 is complimentary to programs in the community that help individuals out with:

- Rent Assistance
- Housing Assistance
- Substance Abuse
- Mental Health
- Meals
- Housing
- Education
- Tax Preparation
- Legal Services
- Clothing
- Employment
- Transportation

**Orrville Area United Way
Supplemental Agency Questions**

United Way of Wayne and Holmes Counties
Agency Name

9-2-2016
Date

Please check the appropriate box in answer to each question.

	Yes	No	Don't Know
Does the agency have checks/balances and distribution of responsibilities such that tasks such as opening mail, paying bills, signing checks, bookkeeping, producing internal financial reports do not rest in the hands of too few persons?	X	<input type="checkbox"/>	<input type="checkbox"/>
Have the board and top administrative officers discussed/reviewed/agreed upon what is appropriate in terms of division of these responsibilities?	X	<input type="checkbox"/>	<input type="checkbox"/>
Does the agency have a board approved Fiscal Policy?	X	<input type="checkbox"/>	<input type="checkbox"/>
Did the auditor meet with the board and top administrator to discuss audit results?	X	<input type="checkbox"/>	<input type="checkbox"/>
Does the board conduct an annual evaluation of the top administrative officer?	X	<input type="checkbox"/>	<input type="checkbox"/>
Are the evaluation results in written form?	X	<input type="checkbox"/>	<input type="checkbox"/>
Does the agency have written by-laws to which they adhere?	X	<input type="checkbox"/>	<input type="checkbox"/>
Does the board and/or a Financial Committee or Executive Committee review complete financial statements monthly including cash flow statements?	X	<input type="checkbox"/>	<input type="checkbox"/>
Are the agency goals/objectives/plans in written form?	X	<input type="checkbox"/>	<input type="checkbox"/>
Do the agency by-laws/guidelines specify a length of term for board members?	X	<input type="checkbox"/>	<input type="checkbox"/>
Are board members required to rotate off the board for some minimum amount of time upon completion of some maximum time of service?	X	<input type="checkbox"/>	<input type="checkbox"/>
Is the agency currently compliant with guidelines for submitting an Audit including the management letter, 990, Agency Agreement, and Verification of Registration with the State of Ohio Attorney General's Office to United Way?	X	<input type="checkbox"/>	<input type="checkbox"/>
What percentage of your Board financially supports your agency?	100 %		

Lisa Reichert

Governing board representative (name, title)

Lisa Reichert
Board President

Todd Jasin, Executive Director

Administrative official (name, title)

Todd Jasin
Executive Director

2-1-1 Budget for Orrville Area United Way Allocation

Revenue	2015 Actual	2016 Budget	2017 Budget
2-1-1 Wayne/Holmes	40,689.00	53,044.00	42,601.00
Orrville United Way	22,000.00	11,000.00	22,000.00
Title III/Area Agency	6,000.00	4,500.00	4,500.00
Wayne County Crippled Children	4,190.00	4,190.00	4,190.00
TOTAL REVENUE	72,879.00	72,734.00	73,291.00

Expenses

Salaries	8,794.00	10,451.00	10,800.00
Employee Benefits	1,212.00	2,735.00	2,808.00
Payroll Taxes	614.00	758.00	783.00
Membership Dues	61.00	60.00	60.00
Professional Fees	38,160.00	39,200.00	39,200.00
Supplies	699.00	720.00	730.00
Telephone	1,569.00	1,600.00	1,650.00
Marketing & Communications	1,935.00	2,000.00	2,000.00
Printing & Publications	-	-	-
Postage & Shipping	592.00	600.00	620.00
Occupancy	3,879.00	3,900.00	3,900.00
Local Travel	35.00	40.00	40.00
Insurance	797.00	820.00	850.00
Equipment Maint.	6,198.00	6,250.00	6,250.00
Awards	12.00	-	-
Depreciation	3,504.00	3,600.00	3,600.00
TOTAL EXPENSES	68,061.00	72,734.00	73,291.00

Revenue over Expense	4,818.00	-	-
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UNITED WAY OF WAYNE AND HOLMES COUNTIES BOARD OF DIRECTORS ROSTER 2016



NAME	January	February	March	April	May	June	July	August
Lisa Reichert	X	X	X	X	X	X		X
Pam Zanone	X	X	X	X	X	X	X	
Marc Harvey	X	X	X	X	X	X	X	X
Greg Buehler	X		X	X	X	X	X	
Carolyn Buxton	X	X	X	X	X		X	
Dan Calvin	X	X	X	X	X		X	X
Stephanie Campbell	X	X	X	X	X	X		X
Jennifer Fox	X	X		X	X	X	X	
Stewart Fiz Gibbon		BOARD TERM BEGAN APRIL 2016			X	X	X	X
Richard Graziano		X	X	X	X		X	X
Kathryn Helmuth	X	X	X	X	X	X	X	X
Nancy Lakes	X		X	X	X	X	X	X
Cameron Manesse	X	X	X	X	X	X	X	X
Scott Myers		BOARD TERM BEGAN APRIL 2016			X	X	X	X
Terry Snoddy	X	X	X	X	X	X	X	X
Christy VanSickle	X		X	X		X	X	
Mary West		X	X	X				X
Darlene Johns	X	X	X	X				
Kevin Phipps	X		X	X				

BOARD TERMS ENDED IN APRIL 2016