

COVER SHEET 2018 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: 330-264-558 **Fax:** **E-Mail:** Todd@uwwh.org

Board President: Lisa Reichart

Address: 215 South Walnut St, **City:** Wooster **E-Mail:** djlisa99@yahoo.com

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 *New Request?* _____
Funded 2017 \$5,000 *2018 Requested* \$15,000
- 2) _____ *New Request?* _____
Funded 2017 \$ _____ *2018 Requested* \$ _____
- 3) _____ *New Request?* _____
Funded 2017 \$ _____ *2018 Requested* \$ _____
- 4) _____ *New Request?* _____
Funded 2017 \$ _____ *2017 Requested* \$ _____

\$15,000 Sum Total of all Dollars Requested for 2018

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.

Todd Jasin
Chief Professional Officer Signature

9/08/17
Date

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

Lisa Reichart
Board President or Treasurer's Signature

9/8/17
Date

2018 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:

\$15,000	+	\$50,229	=	\$65,229
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?

Our request for funding has increased in order to expand marketing, advertising and awareness building of 2-1-1 in the Orrville Service Area. Because 2-1-1 is a public infrastructure, much like a utility, its value is shared across the entire community. A constant presence and awareness building is needed to stay top-of-mind to community members to recall that 2-1-1 is available to them when they need it most.

6. If your program was not funded for the full amount you requested for 2017, what impact did this have on your program? What adaptations did you have to make?

The funding reduction impacted our marketing ability for the program. This impacted our ability to reach the population who would benefit most from the services that are offered.

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, our marketing ability for the program will be affected, thus impacting our ability to reach people who need our services.

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:

N/A

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 to for help. There are no eligibility requirements for 2-1-1 services, the only requirement is for our clients to have a need for help. Often times 2-1-1 is the first number someone in a crisis will call for help. In order to move people out of poverty we need to stabilize a person's life first before we can work on any issues. 2-1-1 provides that lifeline to an individual in crisis to help stabilize their life in order for them to work on their journey out of poverty.

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 provides the most up to date social service database in the county. The database is maintained and updated to provide clients with the most up to date information, thus saving vital phone minutes and client time.

At 2-1-1, Information Specialists are certified and have a goal to make sure each caller is provided with at least three resources when available. Just sharing the name and phone number of the organization doesn't give the person comprehensive information needed for a successful connection. The 2-1-1 database provides the following on each available resource.

- Phone Number
- Address
- Fax Number
- Website and email address
- Contact names
- Hours of operation
- Details of services provided
- Eligibility requirements

Additionally, we will accept walk-in clients and are able to work one on one with clients to complete paperwork they do not understand due to literacy issues. The face-to-face interaction sets us apart from others. We are one of the few sites that people can come in and meet face to face during normal business hours Monday-Friday 8am-5pm.

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 inquirers 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

- 2-1-1 PSA at Movics 10: July 2016: 19,200 impressions
- 2-1-1 Billboard (3 boards x4 weeks): 165,024 impressions
- Area Agency on Aging Senior Forum (logo on notepads/pens) :375 impressions
- 2-1-1 Lock Your Meds Campaign: 5,800 impressions
- Rittman Kids Care T-Shirt – 60 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:

Our short term outcome goal is to have 99% of callers have an increase in knowledge about solutions to their issues. Callers are encouraged to call back if their problem is not resolved.

Long Term outcomes:

Our long term outcome for this program is to engage the data that is being collected from 2-1-1 calls and develop long term solutions around the needs of the callers. For example, last year most of our calls were for income and employment related issues. United Way then developed a county wide workforce initiative to resolve that need in the county. Our goal for 2-1-1 is to continue to look at the data and see where the gaps in services are, then develop long term sustainable solutions to those gaps.

- **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. Because callers often chose to be anonymous, permission for follow up must be obtained during the initial conversation. Even if they have caller ID and can see the phone number, they must ask permission for follow up.

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 during the follow up process is also used as a further means of evaluating the effectiveness of existing community service providers and for identifying gaps in community services. 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**

97% of surveyed clients would contact 2-1-1 again if they needed assistance. Upon follow up, 86% of clients received help or reported help was in progress. 88% of clients discovered new resources or information by contacting 2-1-1. 89% increase in time dedicated to each client since 2012.

- **Discussion of whether or not your outcomes met, exceeded or fell short of your desired outcomes**

We did succeed in meeting our objective of increasing knowledge of the solutions for each caller. However, we did fall short on reaching our goal of informing the public about 2-1-1. Our drop in callers reflects that our marketing efforts did not resonate with the population who will benefit from 2-1-1 services. United Way is currently designing and implementing a new marketing strategy targeted at reaching those who will benefit from 2-1-1 services. The new marketing plan includes a complete redesign of 2-1-1 books into small business card sized fold out posters. United Way is also designing a new marketing strategy targeting high needs neighborhoods.

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 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
2016 Actual	723	4,513 1,500 website visits 6,650 Print	0
2017 Projected	800	5,000 calls 1,600 website visits 6,675 Print	0
2018 Projected	850	5,200 1,650 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)
2016 Actual	12,663	\$64,879	5.12
2017 Projected	13,275	\$65,045	4.89
2018 Projected	13,550	\$63,854	4.72

14. Individuals served

Last year (actual): 12,663

This year (projected): 13,275

Client Demographics

14.

	NUMBER
Types of Clients: Individuals	4,513
Information & Referral, Brochures	6,650
Organizations	250

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	33.08%
75 thru 84	
85 and over	
Unknown	
TOTAL INDIVIDUALS:	100%*
Gender: Male	1,354
Female	3,159
Unknown	
TOTAL INDIVIDUALS:	4,513

	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

**Orrville Area United Way
Supplemental Agency Questions**

United Way of Wayne and Holmes Counties

9/5/2017

Agency Name

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 %		

Governing board representative (name, title)

Administrative official (name, title)

Program Name

United Way 2-1-1

Agency Name

United Way of Wayne and Holmes Counties

	2015 Actual	2016 Actual	2017 Budget	2018 Budget
	Actual	Actual	Budget	Budget
	2-1-1	2-1-1	2-1-1	2-1-1
2-1-1 from Wayne Holmes UW	40,689	45,771	57,230	51,039
Orrville Area United Way	22,000	11,000	5,000	10,000
Grants:				
Title III - Area Agency on Aging	5,280	5,280		
Crippled Children Contract	3,242	4,190	4,190	4,190
Information Handouts				
Total Revenue	71,211	66,241	66,420	65,229
Salaries	8,794	8,871	9,000	9,200
Employee benefits	1,212	2,619	2,754	2,884
Payroll taxes, etc.	614	633	650	675
Total Salaries & related Expenses	10,620	12,123	12,404	12,759
Professional fees	1,780	1,780	1,800	1,800
2-1-1 Support	36,200	30,000	30,000	30,000
Supplies	699	1,418	1,425	1,425
Telephone	1,569	1,291	1,621	
Marketing & Communications	1,935			
Printing and publications		7,615	7,600	7,600
Postage and shipping	592	469		
Occupancy	3,879	2,788	2,800	2,825
Equipment Rental, Maintenance, Support	6,198	6,323	6,400	6,450
Travel - Local	35	28	30	30
Membership dues	61	63	65	65
Awards and recognition	12			
Insurance	797	875	900	900
Misc		106		
Total Operating Expense B4 Depreciation	64,377	64,879	65,045	63,854
Depreciation	1,362	1,362	1,375	1,375
TOTAL ALLOCATIONS & EXPENSES	65,739	66,241	66,420	65,229
REVENUE OVER EXPENSES	5,472	-	-	-

Grants & Collaborations

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

Date: 9/7/2017

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?

Individuals who are in crisis would not be able to access services in a timely manner. Individuals would have to spend time and resources in order to secure solutions to their most pressing problems.

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

If United Way 2-1-1 was not fully funded for 2018, we would have to reexamine services we offer in the community and make cuts to those services. These cuts would prevent the program from achieving its full potential in the community

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 in services to the public as well as the marketing and awareness campaign would have to be reduced.

c. 75% decrease?

We would have to cease all promotion and outreach for the program. Walk in services would cease as well.

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

No other organization provides the comprehensive services that United Way 2-1-1 offers. United Way 2-1-1 is the most comprehensive up to date database on social services in the county.

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

United Way 2-1-1 is collaborating with the Opiate Task Force in distributing 2-1-1 booklets. We also are partnering with the Wayne Workforce Initiative to distribute 2-1-1 booklets to individuals who may need their services.

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

United Way 2-1-1 is a complimentary program in the community that helps individuals with:

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

UNITED WAY OF WAYNE AND HOLES COUNTIES BOARD OF DIRECTORS ROLLER 2017

NAME	January	February	March	April	May	June	July	August
Lisa Reichert	x	x	x	x	x	x	x	x
Pam Zanone	x	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	x	x
Carolyn Buxton	x	x	x	x	x	x	x	x
Dan Calvin	x	x	x	x	x	x	x	x
Stephanie Campbell	x	x	x	x	x	x	x	x
Michele Germinaro	x	x	x	x	x	x	x	x
Lorna Edmondson	x	x	x	x	x	x	x	x
Stewart Fitz Gibbon	x	x	x	x	x	x	x	x
Jennifer Fox	x	x	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	x
Danielle Lehman	x	x	x	x	x	x	x	x
Cameron Manesse	x	x	x	x	x	x	x	x
Scott Myers	x	x	x	x	x	x	x	x
Uday Vaidya	x	x	x	x	x	x	x	x
Christy VanSickle	x	x	x	x	x	x	x	x

United Way 2-1-1 is a free and confidential service. We cannot obtain if board members are receiving services.