

Partner Agency Application for Funding
FY2016
FACE SHEET

Agency Name: Rappahannock United Way	
<i>Has the City/ County Funded This Agency in Previous Years?</i> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Physical Address:	3310 Shannon Park Drive
Mailing Address/PO Box:	As above
City:	Fredericksburg
State:	VA
Zip:	22408
Telephone Number:	540-373-0041
Fax Number:	540-373-0356
Federal Tax ID #:	54-6042936
Web Address:	www.rappahannockunitedway.org
General Email Address:	Wecare@rappahannockunitedway.org
Agency Main Contact:	Sarah Walsh
Title:	Director of Community Impact
Telephone Number:	540-373-0041 x315
E-Mail Address:	swalsh@rappahannockunitedway.org

Agency General Information

Agency Mission:	<p>To improve lives by mobilizing the caring power of our community.</p>
Number of years agency has been in operation:	75 years
Localities Served:	Fredericksburg, Caroline, King George, Spotsylvania and Stafford

Agency Financial Information

	List Programs	Personnel Expenses	Benefits	Operating Expenses	Total Program Budget
1.	Tax Program	62,453	10,440	35,019	107,912
2.	Volunteer Services	32,083	4,332	16,861	53,276
3.	Information Services	4,244	1,137	12,890	18,271
4.	RUW (other) Programs	267,931	40,742	197,130	455,803
5.	RUW Fundraising	120,684	17,979	67,661	206,325
Agency Administration:		198,955	33,366	80,226	312,547
Capital Outlay:		0	0	0	0
Total Agency Budget:		636,350	107,996	409,787	1,154,134

If your application includes funding increases for personnel (to include new positions or merit / COLA increases), please check here and explain in detail the need for this type of increase under each program budget.

Submission Checklist: <i>(include 1 copies of each)</i>	<input type="checkbox"/> IRS 501(c)(3) Letter	<input type="checkbox"/> Audit Report <i>(with Audit Management Letter)</i>	<input type="checkbox"/> Current Financial statement	<input type="checkbox"/> IRS 990
	<input type="checkbox"/> Accountant Contact Information	<input type="checkbox"/> Organizational Chart	<input type="checkbox"/> Current Board Roster <i>(with contact information)</i>	<input type="checkbox"/> Agency's Current Strategic Plan

Agency Administrative Expenses:

In the box below, provide an overview of the administrative costs detailed on the face sheet for the agency as a whole. Please provide justification for and specific amounts of administrative costs that are defrayed by locality funds. If your agency is requesting an increase or decrease in administrative funding, please describe, in detail, the reasons for these changes. (The description should not exceed 15 lines of text.)

Not applicable – Rappahannock United Way does not use locality funds to defray administrative costs.

Capital Outlay:

In the box below, provide an overview of the capital expenses detailed on the face sheet for the agency as a whole. Please provide justification for and specific amounts of capital costs that are defrayed by locality funds. (The description should not exceed 10 lines of text.)

Not applicable – Rappahannock United Way does not use locality funds for capital costs.

Personnel Expenses (General):

In the box below, provide an overview of any increases or decreases in general personnel expenses for the agency. This would include any planned or projected merit or COLA increases, or new positions being requested. Also include a description of any changes to agency benefits structure or cost. (The description should not exceed 10 lines of text.)

Not applicable - Rappahannock United Way does not project any significant increases or decreases in general personnel expenses for FY2016.

Partner Agency Funding Application FY 2016
BUDGET EXPLANATIONS

Rappahannock United Way

Budget Information

Please complete the following chart with the financial information for the agency as a whole. In each area include the budget specifically allocated to your agency from each locality/entity listed below.

	FY2014 Actual	FY2015 Budgeted	FY2016 Projected
Caroline	0	0	500
Fredericksburg	3,000	3,000	3,000
King George	1,560	1,560	1,560
Spotsylvania	3,000	3,000	3,000
Stafford	2,737	2,737	2,737
United Way	10,000	12,000	15,000
Grants	85,304	59,530	60,000
Client Fees	68,990	90,000	90,000
Fundraising	1,726,341	1,858,403	1,860,000
Other <i>(explain below)</i>	18,114	15,982	16,000
Total Agency Budget for PD16	1,921,301	2,034,212	2,051,797

Detail below what is included in the category 'Other':

Other Revenue =

- Interest Income \$3,982
- Rental Income \$12,000

United Way Grant Revenues are the RUW funds allocated to direct costs associated with programs internal to RUW.

Fundraising Revenues are the RUW funds raised by RUW and are either designated and/or allocated to RUW operations, programs and member agency program funding.

Partner Agency Funding Application FY 2016
BUDGET EXPLANATIONS

Agency Name:

Page 4

Rappahannock United Way

Please detail below any legislative initiatives or issues that may impact the agency for the upcoming year and how you are planning for them. This could include new legislation that may increase or decrease projected funding at any level (Federal/State/Local), or could affect grants or designated funds as they are currently received. If you are aware of "outside" funding sources that will expire or be reduced on a set cycle or date, please note those below and how you are planning for them.

Not applicable – there are no legislative initiatives or issues that Rappahannock United Way is aware of that may impact the agency for the upcoming year.

Please detail below any identified agency needs or areas of concern that are currently not being addressed in your funding request. This could include training or technical assistance for specific areas, administrative support for a program or service, evaluation of current programs, or consultation for strategic planning, board support, or fundraising.

Not applicable – there are no identified agency needs or areas of concern that are currently not being addressed in the Rappahannock United Way funding request for the upcoming year.

Please use the area below to provide any locality specific notes or statements that may be relevant to your application.

City of Fredericksburg:

Rappahannock United Way is proud to support the residents of the City of Fredericksburg. Approximately 25% of individuals served by Rappahannock United Way programs and services are allocated to City of Fredericksburg residents. Including several tax site locations such as our busiest tax site at Downtown Library.

Each year Rappahannock United Way hosts a Day of Caring volunteer engagement event for the City of Fredericksburg – hosted jointly with Spotsylvania and Stafford Counties.

Last year more than 3,100 City residents (10%) were served through the Charity Tracker Network and 1,133 calls (20%) from City residents were made to 211 Virginia.

Caroline County:

Rappahannock United Way is proud to support the residents of Caroline County. Approximately 7% of individuals served by Rappahannock United Way programs and services are allocated to Caroline County residents. Including tax site locations such as our tax sites at Bowling Green Baptist Church and Caroline County High School.

Each year Rappahannock United Way hosts a special Day of Caring volunteer engagement day of service for the residents of Caroline County – completing vital volunteer service projects for Caroline County nonprofits.

Last year more than 3,700 Caroline residents (11%) were served through the Charity Tracker Network and 511 calls (10%) from Caroline residents were made to 211 Virginia.

King George County:

Rappahannock United Way is proud to support the residents of King George County. Approximately 8% of individuals served by Rappahannock United Way programs and services are allocated to King George County residents. Including tax site locations such as our tax sites at King George Parks and Recreation.

Each year Rappahannock United Way hosts a special Day of Caring volunteer engagement day of service for the residents of King George County – completing vital volunteer service projects for King George County nonprofits.

Last year more than 2,500 King George residents (8%) were served through the Charity Tracker Network and 348 calls (20%) from King George residents were made to 211 Virginia.

Spotsylvania County:

Rappahannock United Way is proud to support the residents of the Spotsylvania County. Approximately 30% of individuals served by Rappahannock United Way programs and services are allocated to Spotsylvania County residents. Including several tax site locations such as Salem Church Road Library, Thurman Brisben and Virginia Employment Commission.

Each year Rappahannock United Way hosts a Day of Caring volunteer engagement event for the County of Spotsylvania County – hosted jointly with Stafford County and the City of Fredericksburg.

Last year more than 8,700 Spotsylvania residents (27%) were served through the Charity Tracker Network and 1,739 calls (34%) from Spotsylvania residents were made to 211 Virginia.

Stafford County:

Rappahannock United Way is proud to support the residents of Stafford County. Approximately 30% of individuals served by Rappahannock United Way programs and services are allocated to Stafford County residents. Including several tax site locations such as England Run and Porter library branches, Stafford Head Start and Empower House.

Each year Rappahannock United Way hosts a Day of Caring volunteer engagement event for the County of Stafford County – hosted jointly with Spotsylvania County and the City of Fredericksburg.

Last year more than 6,260 Stafford residents (19%) were served through the Charity Tracker Network and 1,444 calls (28%) from City residents were made to 211 Virginia.

Partner Agency Funding Application FY2016
PROGRAM INFORMATION

Program Name:	Page 1
Free Tax Preparation & Financial Education Services	

Each agency submitting a funding request must fill out the following pages for each program serving citizens within the region and for which funding is requested. Any incomplete applications or programs that do not have a full application will not be considered for funding. PLEASE do not include any unrequested information. Each locality reserves the right to request additional information once the application has been submitted.

Program Name:	Free Tax Preparation & Financial Education Services	<i>Is this a new program?</i>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Program Contact:	Sarah Walsh	Title:	Director – Community Impact
Telephone Number:	540-373-0041 x315		
E-Mail Address:	Swalsh@rappahannockunitedway.org		

1. Program Purpose/Description: *(the following description should not exceed 10 lines of text)*

The Rappahannock Region Financial Stability Coalition educates low to moderate-income workers about tax credit eligibility, provides free tax preparation services, and provides financial education to individuals and families of Planning District 16. Through these activities, the Coalition increases the assets of low to moderate-income workers encouraging them to financially support themselves and be less dependent on public assistance.

Rappahannock United Way (RUW) acts as the lead agency for the Coalition, and will recruit and train volunteers to prepare tax returns for individuals and families with a household income less than \$60,000 a year for free. This will save low to moderate-income families from paying upwards of \$200 dollars in tax preparation fees.

Tax Services is coordinated by the Financial Stability Coordinator, an employee of Rappahannock United Way. Direct services are provided by IRS certified volunteer tax preparers and qualified volunteer financial coaches.

2. Justification of Need: *(Please state clearly why this service should be provided to the citizens of the region and why the localities should consider this funding request. If this is a new program, be sure to include the benefit to the region for funding a new request. The following should not exceed 10 lines of text, and should include the most recent data available.)*

The 2010 American Community Survey (most up to date) shows that up to 10% of local families with children live in poverty and that 8.4% of all people living in PD16 live in poverty. A significant portion of these low income working families, with children under the age of 17, are eligible for a variety of tax credits. By filing through Tax Services, low-moderate income families will be screened for eligibility for all tax credits and could receive a tax return of up to \$5,600.

According to the IRS, every year, millions of federal tax credit dollars go unclaimed. IRS data shows that there are thousands of individuals eligible for the credit in this region that have never claimed it. The Coalition wants to help those eligible in PD16 claim their tax credits and encourage them to save their money or pay off debt.

The Rappahannock Region Financial Stability Coalition is the only program currently providing free tax preparation and financial literacy services to low and moderate-income working families in this region.

3. Program Collaboration: *(The following should describe, in detail, examples of collaborative efforts and key partnerships between your program and other programs or agencies in the area, and should not exceed 10 lines of text.)*

In 2010 RUW formed the Rappahannock Region Financial Stability Coalition. RUW serves as the lead agency. The Coalition is comprised of representatives from local nonprofit organizations, social service agencies, banking institutions, local government, and faith-based groups.

Nonprofit organizations – Thurman Brisben Center, Stafford County, Head Starts, Rapp. Goodwill Industries, Quin Rivers Inc., disAbility Resource Center, MICAH, Central Virginia Housing Coalition, RACSB, Thrive, and Catholic Charities Refugee Services. **Social Service Agencies** – All five jurisdictions that make up PD16. **Public Libraries** – Central Downtown, England Run, Salem Church Road, and Porter branches host tax sites. **Government Organizations** – Virginia Employment Commission, Virginia Cooperative Extension, King George Parks and Recreation, Enroll Virginia – Affordable Care Act navigators. **Academic / Education Institutions** – University of Mary Washington and Germanna Community College. **Banking Institutions** – Wells Fargo, Virginia Credit Union, SunTrust, BB&T, Stellar One, Union First Market Bank, Virginia Saves, and PNC. **Low Income / Senior Neighborhoods** – Garrison Woods Apartment Complex, Bragg Hill Center, Dixon Park, Mayfield, Hazel Hill Neighborhoods, Madonna House, and Gardens of Stafford.

Partner Agency Funding Application FY 2016
PROGRAM INFORMATION

4. Program Audience and Service Delivery: *(The following should describe the program's intended audience or client base and how those clients are served. This should include the location of the service and what geographic areas are served or targeted for service. If your program has specific entry or application criteria, please describe it below. Please do not exceed 10 lines of text.)*

The service area for free tax preparation and financial education services is throughout Planning District 16 with a particular focus on low income neighborhoods and employers. Tax Sites are located in each of the 5 localities. Tax sites are open 6 days a week, with day-time, evening and weekend hours.

Primary target audience is low to moderate income households – under \$60,000 annual income.

Secondary target audience is rural residents – those who live in the most rural areas of Caroline, King George and Spotsylvania counties with limited access to services and resources.

Tertiary target audience is those with barriers to access – individuals with disabilities, English as second language, refugee status, and senior citizens.

5. Client Fees: *(Please describe the fees clients must pay for the services provided in this program, and how those fees are determined.)*

There are no clients fees – all tax preparation and financial education services are provided completely free of charge – on average saving individuals \$200 in tax preparation fees.

6. Budget Information: *(Please complete the following chart with the financial information for this program. In each area include the dollars specifically allocated/requested for this program.)*

	FY2014 Actual	FY2015 Budgeted	FY2016 Projected
Caroline	0	0	166
Fredericksburg	1000	1000	1000
King George	0	0	0
Spotsylvania	1000	1000	1000
Stafford	912	912	912
United Way	10000	12000	15000
Grants	60886	40680	50000
Client Fees	0	0	0
Fundraising (RUW)	0	52320	39922
Other	0	0	0
Total Program Budget for PD16	73,798	107,912	105,000

Please indicate, in detail, reasons for increases or decreases in the amounts requested for FY2016. Include whether these changes come from increases in personnel, benefits, or operating expenses. If an increase is being requested, please describe the impact not receiving an increase would have on the program. In particular, please describe in detail if any increase is sought for new positions or personnel.

RUW has submitted a request for level funding this program. The funding amount requested is under 1% of the total agency operating costs.

RUW has continued to receive funding support from the localities since 1998, over these years we have kept our funding request at the same amount without increase. We are requesting the same amount we received last year.

Although RUW continues to serve a greater number of local residents each year, we have not requested an increase in funds in line with this growth. RUW understands that the need in our community is great and the funds to address those needs are limited.

Partner Agency Funding Application FY 2016
PROGRAM INFORMATION

7. Goals, Objectives, & Evaluation: *(Please provide the following information regarding the goals and objectives for your program. Space has been provided for two goals, with two objectives per goal. If your agency is funded by the United Way, please include a copy of your Logic Model for this program as a supplemental attachment. Individual descriptions should not exceed 5 lines of text.)*

Program Goal 1:

RUW's free tax preparation and financial education services aim to increase the financial assets of low to moderate income workers through free tax preparation assistance, claiming tax credits and building financial assets. This will enhance their ability to independently support themselves and their families.

Objectives:

1a.	Increase the number of participants receiving Earned Income Tax Credits and/or other tax credits by 6% from the previous year.
1b.	Increase the overall dollar amount of tax refunds by 6% from the previous year's amount.

Program Goal 2:

Rappahannock United Way's free tax preparation and financial education services aims to engage low to moderate income (less than \$60,000) households in positive financial practices. Financial coaching activities will improve their financial self-sufficiency and independence.

Objectives:

2a.	Increase the number of tax site participants who participate in financial coaching.
2b.	Increase the number / percentage of individuals who save at least 10% their tax credit / refund or pay off debt.

Evaluation Method: *(Please describe the method used to measure the above goals/objectives. Please do not exceed 10 lines of text.)*

Tax Preparation Participants - RUW will utilize online software called Taxwise. The volunteer tax preparers will use Taxwise to prepare and file clients' taxes online. Taxwise creates weekly reports on the number of returns filed, the number of clients that were eligible for tax credits and the refund amounts.

Financial Coaching Participants – RUW will utilize Financial Work Plans with all coaching participants. The Work Plans will be administered by volunteer coaches during each session to assess the awareness levels of participants and create actions plans for building savings and paying down debt.

Evaluations and reports will be administered by tax site volunteers, compiled by Tax Site Coordinators and analyzed by the Financial Stability Manager and RUW's Community Impact team, on a weekly basis throughout tax season.

8. Outcome Data: *(Please give the most recent outcome data for the objectives above. Indicate below what time period the data covers.)*

Data Collection Period: July 1, 2013 – June 30, 2014

Objective 1a.

1,327 households received free tax preparation assistance - a **5% increase** over last year.

Taxpayers helped at the Tax Services free sites received **\$1.8 million** in refunds - **6% increase** over last year.

Objective 1b.

425 households were eligible for and received the Earned Income Tax Credit - a **16% increase** over last year. Taxpayers helped at the free tax sites received an average EITC refund of \$1,661.

187 families were eligible for the Child Tax Credit (CTC) and received more than **\$231,000 in CTC refunds**.

The EITC and CTC refunds taxpayers received were in addition to their federal and/or state refunds.

Objective 2a.

270 individuals participated in financial coaching – a **78% increase** over last year.

Objective 2b.

63 individuals saved **\$95,899** from tax refunds and credits (not previously tracked)

9. Program Goal Updates: (Please provide a brief description of the current status of your program goal(s), given your outcome data. For example, if reported data was well below the stated outcome measure, please indicate why you feel that is the case. Also, include how your outcome data will influence or modify the program for the upcoming fiscal year. These descriptions should not exceed 20 lines of text.)

Program Goal 1:

The Rappahannock Region Financial Stability Coalition believes it was another successful year for assisting low-moderate income households to file their taxes. Not only were there more tax sites, with more volunteers providing free tax assistance and other financial services than in previous years, the number of individuals helped at the tax sites increased for the 10th consecutive year.

Tax Year	Total Tax Returns	Increase over last year	Total EITC Credits	Total Refund	Savings From Tax Prep Fees
04 / 05	54	100%	35	N/A*	\$10,800
05 / 06	108	100%	62	\$214,575	\$21,600
06 / 07	127	18%	70	\$220,462	\$25,400
07 / 08	182	43%	80	\$199,506	\$31,200
08 / 09	426	134%	152	\$422,935	\$80,800
09 / 10	618	46%	194	\$759,353	\$123,600
10 / 11	902	45%	265	\$1,181,482	\$170,000
11 / 12	1,066	18%	325	\$1,584,230	\$207,600
12 / 13	1,261	18%	365	\$1,704,625	\$215,000
13 / 14	1,327	5%	425	\$1,834,797	\$265,400
14 / 15***	1,400	6%	450	\$1,900,000	\$280,000

*** = projected goals for next year

The Coalition is busy planning for another year of growth and success.

Program Goal 2:

This past year RUW offered consistent free financial coaching throughout the tax season for the first time. This proved to be more effective than the scheduled special events in previous years. In total Financial Coaches were able to provide free **financial coaching** services to **270 individuals a significant increase** over previous year outcomes:

- 27 individual Action Plans were created
- 126 financial referrals were made
- 12 bank account referrals
- 63 individuals invested more than \$95,000 into long term saving accounts
- 39% individuals plan to use refund to build savings or pay down debt

The Financial Stability Manager will continue to provided follow-up to all individuals who participate in financial coaching.

Based on the outstanding success of last tax season’s successful coaching sessions, the Coalition plans to repeat this method of offering financial education coaching at the busiest sites based at RUW on Wednesdays and Saturdays, and some additional weekdays depending on volunteer coaches’ availability.

Goals for next year project continued growth and success.

10. Community Impact: (Please provide at least two examples of how your services have impacted members of our community. This description should not exceed 20 lines of text.)

Mrs. X was a first time client for the FREE full service tax preparation services. Arriving at one of the Stafford locations, Mrs. X was greeted, screened as eligible and invited to receive help from an IRS certified volunteer tax preparer called Linda. Mrs. X spent some time talking through her financial situation with Linda and it became clear that she was a hard-working lady and was delighted to find out that she qualified for the Earned income Tax Credit.

Once the tax return was completed Linda was excited to inform Mrs. X that she would be receiving a total tax refund of over \$8,000. Mrs. X explained to Linda that she had not filed her tax return for the past 2 years but had bought all her paperwork just in case they could help her file the same day. Linda was happy to help Mrs. X file the returns for the past 2 years also. Almost 3 hours later Linda and Mrs. X had completed and filed the return for all 3 years. **The total amount of refunds (including EITC) was over \$24,000!** Mrs. X told Linda that this amount of money was going to change her life. Taking control of her financial situation was going to be a positive change that would last a lifetime.

John is a young professional who only graduated from college a couple of years ago. John works full time for a local organization, but due to high living costs and his modest income, still lives at home with his parents.

John received information from his employer through an RUW email blast and realized that his income was under the threshold for RUW free tax preparation services. John clicked on the link to the RUW website and discovered that there were three ways for him to file. As a young computer confident individual John thought he would have a go at preparing and filing his own tax return online through the MyFreeTaxes software available through RUW.

"In just under one hour I was all done with my return," said John, "it was really easy to follow the online prompts and I knew that if I got stuck help was just a phone call away." Although John was not eligible for any tax credits he did save himself the \$200 that it would have cost him to pay a professional tax preparation service as he had done in previous years. As an added bonus John had spent time looking around the RUW website and found financial resources that inspired him to start planning for his future by starting a pension plan.

11. Collaborative Impact: (Please describe how the community would be impacted if your agency were dissolved or merged with another partner agency. This description should not exceed 20 lines of text.)

Over the past ten years, RUW has acted as the lead agency of the Coalition. It is comprised of representatives from local nonprofit organizations, social service agencies, banking institutions, local government, and faith-based groups. The core strength of the Coalition is the collaborative spirit of its member organizations – we are extremely proud of the fact that this is a community program.

Although led by Rappahannock United Way the sum of its many parts is much bigger than any one of the member organizations. We believe that it is a best practice to be able to bring together many organizations with similar but individual missions – to work together towards one shared community goal. Each member brings different offerings – contacts, volunteers, physical space, funding, and outreach.

Each year RUW explores the option with Coalition members of another local organization serving as lead agency. Each year it is determined that RUW is best able to meet the needs of the program.

Should RUW dissolve as an organization there may be some aspects of the program that continued such as Coalition members providing free tax preparation services. However, as the fiscal agent, funding would have to be sought and secured by another entity.

In addition RUW is responsible for fundraising more than \$3 million each year to support local nonprofits in addition to its own programming, Should RUW dissolve this would leave a significant shortfall in funds with devastating impact for more than 30 local programs and services.

Partner Agency Funding Application FY 2016
SERVICE DATA

Program Service Data: **Service Period:** 07/01/2013 **to** 06/30/2014

Locality Served	Total Served		Gender		Race					
	FY2014	FY2016*	Male	Female	Caucasian	African American	Asian	Hispanic	American Indian	Other / Not Given
Fredericksburg	318	300								
Caroline	80	100								
King George	93	75								
Spotsylvania	385	300								
Stafford	438	350								
Other / Not Given	13	275	Not Given 1,015							
Total	1327	1400	129	183	158	131	9	70	3	956

**Please include the projected number to be served in each locality for the upcoming fiscal year.*

Locality Served	Age Groups								Income Levels				
	0-4	5-10	11-13	14-18	19-25	26-40	41-60	60 +	Under \$10,000	\$10,000 - \$19,000	\$20,000 - \$39,000	\$40,000 - \$59,000	Over \$60,000
Fredericksburg													
Caroline													
King George													
Spotsylvania													
Stafford													
Other													
Total	0	0	0	6	139	236	402	258	306	256	382	134	14

Please describe below your data collection methodology and tracking measures. Indicate systems or processes that are used and responsible parties. Please also describe how your projections are determined for the upcoming year. If any of the above information is not available, please indicate why:

RUW program volunteers collect and input demographic data for all tax program clients in to the TaxWise online filing system. The IRS certifies all volunteers and the tax sites for the RUW program – this means very strict IRS guidelines must be followed to maintain certification. IRS guidelines do not allow programs to share or report any tax client information even in an aggregate format unless the tax client signs a release form.

Approximately 60% of tax clients do sign a release form, however questions regarding gender, ethnicity and race provide an option of 'not given' which results in low data results for those categories.

The IRS software does not allow local tax programs to pull information on the demographics we are serving according to each locality.

The Program Manager is able to pull reports from TaxWise for all tax clients signing a release form as reflected in the data presented above.

All projections are based on prior year increases over the past 10 years. An average increase of approximately 5% has been made in recent years so we believe it to be a realistic projection moving forward.

Partner Agency Funding Application FY2016
PROGRAM INFORMATION

Program Name:	Page 1
Volunteer Services	

Each agency submitting a funding request must fill out the following pages for each program serving citizens within the region and for which funding is requested. Any incomplete applications or programs that do not have a full application will not be considered for funding. PLEASE do not include any unrequested information. Each locality reserves the right to request additional information once the application has been submitted.

Program Name:	Volunteer Services	Is this a new program?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Program Contact:	Terri Center	Title:	Volunteer Coordinator
Telephone Number:	540-373-0041 x314		
E-Mail Address:	tcenter@rappahannockunitedway.org		

1. Program Purpose/Description: *(the following description should not exceed 10 lines of text)*

To promote volunteer engagement as a means of fostering increased citizen involvement in the community. Volunteer Services works to engage local businesses, churches, schools, civic organizations, families and individuals to volunteer with local nonprofit agencies to enhance or maintain needed human services in our area.

Creatively using a web-based volunteer matching database and organizing special events and projects, Rappahannock United Way's (RUW) Volunteer Services Program acts as an advocate for volunteer engagement by:

- Educating and building the capacity of local nonprofits in best practices for engaging volunteers.
- Mobilizing volunteers to identify and address community issues to improve lives in our community.
- Encouraging volunteer engagement by matching interested volunteers with agencies in need of assistance.

2. Justification of Need: *(Please state clearly why this service should be provided to the citizens of the region and why the localities should consider this funding request. If this is a new program, be sure to include the benefit to the region for funding a new request. The following should not exceed 10 lines of text, and should include the most recent data available.)*

Volunteering is a key way for citizens of our region to develop leadership and employment skills, forge community bonds, and contribute to the health and welfare of their community. In exchange, the community benefits from a skilled and talented volunteer pool, quantifiable social impact, a direct cost savings for nonprofits and a heightened awareness of community needs. Volunteers are a vital resource for the effective operation of nonprofit organizations serving this region. Almost all local nonprofits rely heavily on the support of both episodic and long term volunteers to provide valuable services to our community.

Through a variety of outreach efforts and trainings last year, RUW mobilized more than **1,309 volunteers**, contributing more than **7,400 hours** of volunteer time, at a total value of roughly **\$165,000 worth of time invested into our local community**. This investment of time and volunteer talent saves the tax payers of our region money while making the region a better place to live and do business.

3. Program Collaboration: *(The following should describe, in detail, examples of collaborative efforts and key partnerships between your program and other programs or agencies in the area, and should not exceed 10 lines of text.)*

The Rappahannock United Way volunteer website works with local nonprofit organizations to promote a wide variety of volunteer opportunities and events to individuals, groups and businesses interested in volunteer engagement in our community.

There are currently more than 120 local nonprofit organizations actively using the volunteer website to promote hundreds of volunteer events and opportunities.

Without this central online hub of volunteer listings individuals would have to search an overwhelming number of individual websites for local nonprofits. By utilizing one central hub smaller, lesser known nonprofits can showcase their work and engage new supporters and volunteers.

Partner Agency Funding Application FY 2016
PROGRAM INFORMATION

4. Program Audience and Service Delivery: *(The following should describe the program's intended audience or client base and how those clients are served. This should include the location of the service and what geographic areas are served or targeted for service. If your program has specific entry or application criteria, please describe it below. Please do not exceed 10 lines of text.)*

The service area for volunteer services is throughout Planning District 16 with volunteer events and opportunities available in each of the 5 localities. The volunteer center is open 5 days a week from 8:00am through 4:30pm.

The volunteer website is available 24 hours 7 days a week.

The target audience is the community as a whole – all ages and all abilities:

- all those able and willing to volunteer in Planning District 16
- all nonprofit organizations in Planning District 16

5. Client Fees: *(Please describe the fees clients must pay for the services provided in this program, and how those fees are determined.)*

There are no fees charged to use any part of Volunteer Services to nonprofits or volunteers.

6. Budget Information: *(Please complete the following chart with the financial information for this program. In each area include the dollars specifically allocated/requested for this program.)*

	FY2014 Actual	FY2015 Budgeted	FY2016 Projected
Caroline	0	0	166
Fredericksburg	1000	1000	1000
King George	560	560	560
Spotsylvania	1000	1000	1000
Stafford	912	912	912
United Way	0	0	0
Grants	0	8,117	8,117
Client Fees	0	0	0
Fundraising (RUW)	49,804	11,589	11,589
Other	0	0	0
Total Program Budget for PD16	53,276	53,276	53,276

Please indicate, in detail, reasons for increases or decreases in the amounts requested for FY2016. Include whether these changes come from increases in personnel, benefits, or operating expenses. If an increase is being requested, please describe the impact not receiving an increase would have on the program. In particular, please describe in detail if any increase is sought for new positions or personnel.

RUW has submitted a request for level funding this program. The funding amount requested is under 1% of the total agency operating costs.

RUW has continued to receive funding support from the localities since 1998, over these years we have kept our funding request at the same amount without increase. We are requesting the same amount we received last year.

Although RUW continues to serve a greater number of local residents each year, we have not requested an increase in funds in line with this growth. RUW understands that the need in our community is great and the funds to address those needs are limited.

7. Goals, Objectives, & Evaluation: *(Please provide the following information regarding the goals and objectives for your program. Space has been provided for two goals, with two objectives per goal. If your agency is funded by the United Way, please include a copy of your Logic Model for this program as a supplemental attachment. Individual descriptions should not exceed 5 lines of text.)*

Program Goal 1:

The community will be engaged and feel better connected with meeting community needs.

Objectives:

1a.	<p>To recruit and match volunteers of diverse ages, skills, abilities and backgrounds with volunteer events, projects and opportunities with local nonprofit organizations.</p> <p>Goal: 1,500 – 10% increase in volunteers over the previous year.</p>
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1b.	<p>To ensure volunteers have a positive and rewarding experience when engaged in volunteering.</p> <p>95% of volunteers report a positive experience when engaged in volunteering.</p>
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Program Goal 2:

Area nonprofit agencies will be better able to provide more opportunities to engage volunteers in to improve services to those in need, resulting in a better community.

Objectives:

2a.	<p>Nonprofit agency staff (including public schools and faith-based organizations) will acquire the skills necessary to recruit, engage, and retain volunteers.</p> <p>To provide 2 volunteer training and networking opportunities.</p> <p>90% satisfaction rate for volunteer trainings and meetings. Individualized assistance to smaller organizations and/or staff who are new to their roles.</p>
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2b.	<p>Nonprofit agencies, local schools and faith based organizations will utilize the Volunteer Website to better recruit and manage volunteers.</p> <p>5% increase in the number of registered active agencies on Volunteer Website.</p>
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Evaluation Method: (Please describe the method used to measure the above goals/objectives. Please do not exceed 10 lines of text.)

Evaluation will be performed by the Volunteer Coordinator who will initiate and analyze data gathered from agency and volunteer surveys, and the (Get Connected) RUW volunteer website, www.RUWVolunteer.org

Evaluations will be completed following each major volunteer event for episodic/one time volunteers and at quarterly intervals throughout the year for volunteers involved in long term volunteer commitments.

8. Outcome Data: (Please give the most recent outcome data for the objectives above. Indicate below what time period the data covers.)

Data Collection Period: July 1, 2013 – June 30, 2014

Objective 1a.

To increase the number / percentage of volunteers recruited and matched with episodic or one time volunteer events with local nonprofit organizations.

Through a variety of outreach efforts and trainings last year, RUW mobilized more than **1,309 volunteers**, contributing more than **7,400 hours** of volunteer time, at a total value of roughly **\$165,000 worth of time invested into our local community**. This investment of time and volunteer talent saves the tax payers of our region money while making the region a better place to live and do business.

Objective 1b.

To increase the percentage of volunteers reporting a positive engagement experience and desire to continue volunteering.

96% of volunteers to report a positive experience when engaged in volunteering.

Objective 2a.

To increase the number / percentage of nonprofit agency staff and volunteers who acquire volunteer skills by successfully attend volunteer training and networking meetings.

16 volunteer training events were held with 155 participants

Objective 2b.

To increase the number / percentage of nonprofit agencies that reports an improvement of service delivery to those in need through the effective utilization of volunteers.

100% of agencies reported an improvement in agency/program operations due to utilization of Volunteer Services.

9. Program Goal Updates: (Please provide a brief description of the current status of your program goal(s), given your outcome data. For example, if reported data was well below the stated outcome measure, please indicate why you feel that is the case. Also, include how your outcome data will influence or modify the program for the upcoming fiscal year. These descriptions should not exceed 20 lines of text.)

Program Goal 1:

The continuing economic climate is increasing the demand on area nonprofit services. This causes a higher demand for volunteer support.

Volunteer Services is already responding to this increased demand as more volunteers than ever before are being successfully recruited and matched. Volunteer Services continues to build new relationships with local schools, colleges and businesses to expand the pool of skilled volunteers.

To increase the number of volunteers in Planning District 16, Volunteer Services focused on promoting large scale volunteer events this year, including the fifth annual King George Day of Caring, the fourth annual Caroline Day of Caring, and the twenty first annual Fredericksburg Day of Caring (for Spotsylvania, Stafford, and Fredericksburg). These events encourage individuals to give back to the community and volunteer.

Each year, the number of volunteers positively engaged in serving the community continues to grow.

The high unemployment rate has resulted in more people than ever before looking to volunteer engagement as a means to building work experience and skills to ensure employability in a struggling work environment – for both young people new to the workforce and older adults looking to change career path.

RUW's Volunteer Services is able to react positively to meet the needs of individuals looking for community engagement through volunteerism and the needs of the nonprofit community to respond to ever increasing demands on their vital services.

Next year we aim to mobilize a total of **1,500 volunteers**. An increase of **10% over the previous year**.

Program Goal 2:

In an effort to boost nonprofit capacity this year, RUW's Volunteer Services will provide multiple training opportunities for volunteers and for nonprofit agencies to include: at least one Volunteer/Agency Meet & Greet; a series of nonprofit Volunteer Utilization Trainings; one Board Match Training; and two Volunteer Software Trainings.

Fully utilizing the new Volunteer software/website this past year has presented a modern, attractive and intuitive user interface between individuals wishing to volunteer and local nonprofits with volunteer needs. RUW absorbs the cost of the website and presents it as a no-cost service to our community. The website makes it easy, convenient and affordable to recruit, manage and track volunteers 24 hours a day, seven days a week, year round.

Every week, more area nonprofits sign-on to the volunteer website, posting new volunteer opportunities and organizing volunteer events in partnership with Volunteer Services. We are confident this trend will continue.

Next year we aim to have a total of **150 active organizations** using the Volunteer Website. An **increase of 10%** over the previous year.

10. Community Impact: *(Please provide at least two examples of how your services have impacted members of our community. This description should not exceed 20 lines of text.)*

More than 80 volunteers were recruited, trained and certified this past year by the Volunteer Center for the RUW Tax Program. Volunteers assisted with financial coaching and tax preparation. As a result more than \$1.8 million of tax refunds and credits were put back in the pockets of local hard working families.

Refunds and credits were used by tax clients to pay down debt and build assets – volunteers provided expertise and guidance to low to moderate income workers making them aware of local resources to improve their financial situations and work towards financial self-sufficiency.

Without this team of dedicated volunteers these services would not have been possible.

Once again this year more than 300 volunteers from local businesses gave a day of their time to complete vital community projects throughout the region. Projects' including repairs to low-income senior's homes, painting the rooms at the Thurman Brisben homeless shelter, yard work and repairs at the Hope House women's shelter, fixing furniture at the domestic violence shelter, cleaning and office work at the legal aid center. Thousands of dollars' worth of hard work and expertise is provided through these annual days of caring. Without the sweat and dedication of these volunteers many projects would go undone and those in need would stay in need.

11. Collaborative Impact: *(Please describe how the community would be impacted if your agency were dissolved or merged with another partner agency. This description should not exceed 20 lines of text.)*

Rappahannock United Way has provided volunteer center services to the nonprofit community for the past 21 years at no cost. Providing a vital service with invaluable services that no one else locally provides.

Should RUW dissolve as an organization local nonprofits would no doubt continue to work towards using volunteers to support their services however they would have to rely on their own outreach efforts. Most local nonprofits do not have personnel budgets to support hiring their own Volunteer Coordinator or build their own volunteer opportunity listing websites.

Rappahannock United Way uses its own fundraising efforts and grant writing expertise to secure funding to support one Volunteer Coordinator position and volunteer online website for the entire community – at no cost to the community.

It is highly unlikely that another entity could provide this service in this way to the local nonprofit community.

Partner Agency Funding Application FY 2016
SERVICE DATA

Program Service Data: **Service Period:** 07/01/2013 **to** 06/30/2014

Locality Served	Total Served		Gender		Race					
	FY2014	FY2016*	Male	Female	Caucasian	African American	Asian	Hispanic	American Indian	Other / Not Given
Fredericksburg	232	300								
Caroline	16	100								
King George	62	100								
Spotsylvania	342	350								
Stafford	324	350								
Other / Not Given	333	300								
Total	1,309	1,500								

**Please include the projected number to be served in each locality for the upcoming fiscal year.*

Locality Served	Age Groups								Income Levels				
	0-4	5-10	11-13	14-18	19-25	26-40	41-60	60 +	Under \$10,000	\$10,000 - \$19,000	\$20,000 - \$39,000	\$40,000 - \$59,000	Over \$60,000
Fredericksburg													
Caroline													
King George													
Spotsylvania													
Stafford													
Other													
Total													

Please describe below your data collection methodology and tracking measures. Indicate systems or processes that are used and responsible parties. Please also describe how your projections are determined for the upcoming year. If any of the above information is not available, please indicate why:

*Although Volunteer Services does request and record demographic information regarding income, race and gender for individuals accessing the Volunteer Website, it is not required. Research has shown that requiring this information from volunteers (making it mandatory) has served as a deterrent to potential volunteers using the online Volunteer Website, and as a result it is requested but it is self-reported on a voluntary basis.

Volunteer Services provides volunteer referrals regardless of an individual's race, gender, age, and /or income.

Partner Agency Funding Application FY2016
PROGRAM INFORMATION

Program Name:	Page 1
Information Services	

Each agency submitting a funding request must fill out the following pages for each program serving citizens within the region and for which funding is requested. Any incomplete applications or programs that do not have a full application will not be considered for funding. PLEASE do not include any unrequested information. Each locality reserves the right to request additional information once the application has been submitted.

Program Name:	Information Services	<i>Is this a new program?</i>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Program Contact:	Sarah Walsh	Title:	Director, Community Impact
Telephone Number:	540-373-0041 x315		
E-Mail Address:	swash@rappahannockunitedway.org		

1. Program Purpose/Description: *(the following description should not exceed 10 lines of text)*

Rappahannock United Way's Information Services strives to inform the community of local resources, services and programs available to individuals and families in Planning District 16. Information Services works to bridge the gap between community services and individuals who can benefit from those services.

Information Services is the local partner agency of 2-1-1 Virginia which connects individuals in need to trained professionals who can provide referrals to health and human services. 2-1-1 Virginia is a free and confidential service, available 24 hours a day, 7 days a week, and hosts Virginia's largest health and human service database.

To help agencies serve more people in need, Rappahannock United Way also created the Rappahannock Area Charity Tracker Network. Charity Tracker is an online database which allows local direct-service agencies to share and track client data with other local organizations. Charity Tracker makes it possible for more individuals and families to receive assistance and allows organizations to reduce and eliminate duplicate services.

2. Justification of Need: *(Please state clearly why this service should be provided to the citizens of the region and why the localities should consider this funding request. If this is a new program, be sure to include the benefit to the region for funding a new request. The following should not exceed 10 lines of text, and should include the most recent data available.)*

When people are in crisis it is often difficult for them to find the resources that can help them. Information Services promotes access to community services and assistance programs available to Stafford County residents through a variety of means, including telephone assistance, Information Share meetings, weekly Information Share updates via the InfoShare Listserv, and by producing online and printed copies of the Community Connections Directory and Quick Guide.

2-1-1 Virginia is widely accessible and connects individuals and agencies to local health and human services. 2-1-1 Virginia makes the search for resources less confusing by providing a streamlined and centralized resource center. Unfortunately, many people in our community are still not aware of this incredible resource. Information Services works year round to raise awareness about 2-1-1. Over **5,185 individuals** used 2-1-1 last year.

More than **30,000 individuals** last year sought assistance through the Charity Tracker Network. The network made it easier for agencies to help local residents by providing an easy way to share information and services.

3. Program Collaboration: *(The following should describe, in detail, examples of collaborative efforts and key partnerships between your program and other programs or agencies in the area, and should not exceed 10 lines of text.)*

The Rappahannock United Way co-hosts the Charity Tracker network with the Fredericksburg Area Food Bank. More than 100 local service provider organizations currently belong to the network and utilize the online client management system on a daily basis.

Rappahannock United Way serves as a fiscal agent and provides staff support to administrate the system. Securing the funds to cover the costs of the service so that it can be provided at no cost to local network members.

Network members include Departments of Social Services for all 5 localities in Planning District 16, all Food Bank member food pantries, SERVE, Salvation Army and many more throughout the region.

All network members are required to sign an agreement and complete training to ensure the integrity of the data within the system is maintained to the highest standards – to protect clients information and ensure the highest level of support and referrals are provided to those most in need in our community.

Partner Agency Funding Application FY 2016
PROGRAM INFORMATION

4. Program Audience and Service Delivery: *(The following should describe the program's intended audience or client base and how those clients are served. This should include the location of the service and what geographic areas are served or targeted for service. If your program has specific entry or application criteria, please describe it below. Please do not exceed 10 lines of text.)*

The service area for information services is throughout Planning District 16 with Charity Tracker network members located in each of the 5 localities. Information services staff support is available 5 days a week from 8:00am through 4:30pm. However, Rappahannock United Way staff attends community events and provide outreach relating to 211 and other community resources at many weekend and evening times.

The Charity Tracker website is available 24 hours 7 days a week.

211 Virginia is available as a telephone service and searchable web database 24 hours 7 days a week.

The target audience is the community as a whole – all those in need especially those experiencing poverty or other issues causing barriers to self-sufficiency.

5. Client Fees: *(Please describe the fees clients must pay for the services provided in this program, and how those fees are determined.)*

There are no fees charged to Charity Tracker network members. Rappahannock United Way currently fundraises and secures grant support to offset the membership dues for its members.

There are no charges associated with calling 211 Virginia – it is through a 1-800 free call service.

6. Budget Information: *(Please complete the following chart with the financial information for this program. In each area include the dollars specifically allocated/requested for this program.)*

	FY2014 Actual	FY2015 Budgeted	FY2016 Projected
Caroline	0	0	166
Fredericksburg	1,000	1000	1000
King George	1,000	1000	1000
Spotsylvania	1,000	1000	1000
Stafford	912	912	912
United Way	0	0	0
Grants	0	8,117	8,117
Client Fees	0	0	0
Fundraising (RUW)	14,359	2,770	2,770
Other	0	0	0
Total Program Budget for PD16	18,271	18,271	18,271

Please indicate, in detail, reasons for increases or decreases in the amounts requested for FY2016. Include whether these changes come from increases in personnel, benefits, or operating expenses. If an increase is being requested, please describe the impact not receiving an increase would have on the program. In particular, please describe in detail if any increase is sought for new positions or personnel.

RUW has submitted a request for level funding this program. The funding amount requested is under 1% of the total agency operating costs.

RUW has continued to receive funding support from the localities since 1998, over these years we have kept our funding request at the same amount without increase. We are requesting the same amount we received last year.

Although RUW continues to serve a greater number of local residents each year, we have not requested an increase in funds in line with this growth. RUW understands that the need in our community is great and the funds to address those needs are limited.

Partner Agency Funding Application FY 2016
PROGRAM INFORMATION

7. Goals, Objectives, & Evaluation: *(Please provide the following information regarding the goals and objectives for your program. Space has been provided for two goals, with two objectives per goal. If your agency is funded by the United Way, please include a copy of your Logic Model for this program as a supplemental attachment. Individual descriptions should not exceed 5 lines of text.)*

Program Goal 1:

Individuals in need are more informed about community resources, services and programs.

Objectives:

1a.	The number of callers to 2-1-1 will increase in Planning District 16. Goal: 10% increase over last year
1b.	The number of individuals educated about 2-1-1 and other community resources through outreach activities will increase over last year. Goal: 10% increase over last year

Program Goal 2:

Local service providers work together and share resources and information with one another. By working together, agencies will create a streamlined network of services making it easier for individuals in need to find assistance.

Objectives:

2a.	Local service providers have access to and fully utilize community resources to connect those they serve with services - to include but not limited to Quick Guide, 2-1-1 website and phone service. Goals: Increase the number of service providers, churches, schools and businesses that utilize the Quick Guide Resource by 10% over last year.
2b.	Local service providers utilize Charity Tracker so that more people are able to receive assistance and organizations are able to better serve more individuals in need in the community. Goals: Increase the number of local service providers using Charity Tracker by 5% over last year.

Evaluation Method: (Please describe the method used to measure the above goals/objectives. Please do not exceed 10 lines of text.)

Evaluation will be performed by the Community Impact Assistant who will initiate and analyze data gathered from agency and caller surveys, 2-1-1 call statistics and Charity Tracker reports.

Evaluation will be completed at quarterly intervals throughout the year. Surveys will be distributed to participants of Information Share meetings after each meeting. The InfoShare Listserv and other Information Services resources will be evaluated through participant surveys at the end of the fiscal year.

Charity Tracker has sophisticated reporting capabilities, which will allow RUW to track both Charity Tracker members and client information on an as-needed basis.

8. Outcome Data: (Please give the most recent outcome data for the objectives above. Indicate below what time period the data covers.)

Data Collection Period: July 1, 2013 – June 30, 2014

Objective 1a.

To increase the number / percentage of callers and accurate referrals to 2-1-1.

5,185 callers (8% decrease) to 2-1-1 from Planning District 16. NOTE – 211 Virginia reports that while call numbers are down regionally, the number of website hits are in fact up.

Objective 1b.

To increase the number of businesses, churches, civic organizations, schools and nonprofit agencies aware of community resources based on presentations made.

Presentations were made to **6,839 individuals** about Community Resources, 2-1-1 Virginia and Charity Tracker.

Objective 2a.

To increase the number of local providers who have access and utilize community resources.

Information about available resources was presented to **420 representatives** from **community organizations and businesses**.

Objective 2b.

To increase the number of local service providers using Charity Tracker.

At the beginning of the year 52 organizations were using Charity Tracker. By the close of the year **100 local agencies** were registered to use Charity Tracker. **10% increase** over last year.

9. Program Goal Updates: (Please provide a brief description of the current status of your program goal(s), given your outcome data. For example, if reported data was well below the stated outcome measure, please indicate why you feel that is the case. Also, include how your outcome data will influence or modify the program for the upcoming fiscal year. These descriptions should not exceed 20 lines of text.)

Program Goal 1:

Due to the continuing state of the economy, an increasing number of individuals continue to depend on services provided by local nonprofits.

Information Services is responding to this increased demand by advocating for community resources, services and programs throughout Planning District 16.

Information Services has noticed that a significant number of those requesting information and referrals continue to be first time callers who are experiencing a financial crisis for the first time due to the continuing downturn in the economic climate. This means that the individuals currently facing difficult times are not familiar with the resources available to them. Information Services continues to educate the Planning District about local human services.

Information Services continues to build new relationships with local schools, colleges, government organizations, nonprofits, and businesses to promote available resources and 2-1-1 Virginia.

Each year, the number of people in need in our community continues to grow. Information Services continues to be a vital part in helping those in need find resources they can benefit from.

Program Goal 2:

Information Services is working year round to share useful resources and information with members of the InfoShare Listserv and attendees at the Information Share Meetings. Listserv membership and attendees continue to grow.

Information Services works hard all year round building and maintaining networks and collaborative efforts with local nonprofits, service providers and businesses. These partnerships increase the capacity service providers and streamline service provision to those served.

Successful collaborations include but are not limited to Rappahannock Region Financial Stability Coalition, Youth First Partnership, Health Care Safety Net Council, Continuum of Care, and the Rappahannock Region Holiday Assistance Coalition.

Information Services also advocates for 2-1-1 Virginia at various community events including events at schools, government agencies, nonprofit organizations, local companies, and churches.

This year, we continue to expand the Charity Tracker network to more agencies. Initially used just for holiday assistance programs, this system will allow local organizations to share client data to ensure there are no duplications in services year round. It will also provide a more strategic approach to providing services in our area. Charity Tracker makes it easy for local agencies to share data, work together, and spread their resources to more families and individuals in need for all of Planning District 16.

This year, we plan to **increase membership from 100 to 105 organizations** – an **increase of 5%**.

10. Community Impact: *(Please provide at least two examples of how your services have impacted members of our community. This description should not exceed 20 lines of text.)*

Testimonials from local service organizations who are members of the Charity Tracker network – by utilizing the Charity Tracker system they are able to catch duplicate requests for assistance to maximize the number of households assisted. With limited resources available in our community this truly helps those most in need access the services they so desperately need – improving quality of life in many ways:

“So far we have caught 41 families having drawn two or more food donations for Thanksgiving last year using kids multiple times and people applying and using heads of households from other families as members to get more. .. We have just started with Christmas and have found 5 that drew from other counties at the same time they drew from here. This is one of the best programs I have ever used. Thank you so much.”

“I am stoked over this and really want to use this as a tool. We can really expand the use of our limited resources if we are all on board. We are catching so many double and triple dipping that it is crazy. Love this program.”

“If you were to ask me what has helped us to survive the extreme economic times that all non-profits and their clients are suffering through, my first response would be Charity Tracker. Through Charity Tracker, we are able to make sure that we are not duplicating services and missing the opportunity for our clients to become more accountable for their own choices. Now that so many other non-profits are in the Charity Tracker network, we have a much greater chance of being successful in these efforts.”

“Charity Tracker has enabled government agencies, nonprofits and churches to share our resources. DSS assists over 6,000 individuals, families, elderly, disabled and children. Using Charity Tracker has allowed us to ensure residents who live in our county, are not receiving services from another agency. Charity Tracker saves organizations time by being able to post a client’s needs to all groups at the same time.”

11. Collaborative Impact: *(Please describe how the community would be impacted if your agency were dissolved or merged with another partner agency. This description should not exceed 20 lines of text.)*

Rappahannock United Way has provided the Charity Tracker network to the nonprofit community for the past 6 years at no cost. Providing a vital service with invaluable services that no one else locally provides.

Should RUW dissolve as an organization local nonprofits would no doubt continue to work towards tracking services provided to their clients however they would have to rely on using their own individual systems and would struggle to share and cross reference client information in an effective and efficient manner. Most local nonprofits do not have budgets to support purchasing additional client management systems.

Rappahannock United Way uses its own fundraising efforts and grant writing expertise to secure funding to support one full time Community Impact Assistant position to provide administrative and training support to the purchased Charity Tracker software for the entire community – at no cost to the community.

It is highly unlikely that another entity could provide this service in this way to the local nonprofit community.

Partner Agency Funding Application FY 2016
SERVICE DATA

Program Service Data: **Service Period:** 07/01/2013 **to** 06/30/2014

Locality Served	Total Served		Gender		Race					
	FY2014	FY2016*	Male	Female	Caucasian	African American	Asian	Hispanic	American Indian	Other / Not Given
Fredericksburg	3,166									
Caroline	3,711									
King George	2,503									
Spotsylvania	8,729									
Stafford	6,265									
Other / Not Given	8,333									
Total	32,707	35,000	8,754	23,856	12,299	11,284	59	2,484	315	6,266

**Please include the projected number to be served in each locality for the upcoming fiscal year.*

Locality Served	Age Groups								Income Levels				
	0-4	5-10	11-13	14-18	19-25	26-40	41-60	60 +	Under \$10,000	\$10,000 - \$19,000	\$20,000 - \$39,000	\$40,000 - \$59,000	Over \$60,000
Fredericksburg													
Caroline													
King George													
Spotsylvania													
Stafford													
Other													
Total	2,351	4,294	2,034	2,839	2,954	6,128	6,648	2,802	9,913	14,695	1,957	185	0

Please describe below your data collection methodology and tracking measures. Indicate systems or processes that are used and responsible parties. Please also describe how your projections are determined for the upcoming year. If any of the above information is not available, please indicate why:

The demographic data provided in this table represents all the individuals directed served and tracked through the Charity Tracker system by all of the Network members including Rappahannock United Way Information Services.

Where there are gaps in the data it means the client declined to release that information.

2-1-1 clients are tracked separately and the only data gathered is based on the location (city/county) of the caller.