



# Spotsylvania County

## Partner Agency Application for Funding FY 2015

# FACE SHEET



<b>Agency Name:</b> Rappahannock United Way, Inc.	
<i>Has Spotsylvania 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:	<a href="http://www.rappahannockunitedway.org">www.rappahannockunitedway.org</a>
General Email Address:	<a href="mailto:wecare@rappahannockunitedway.org">wecare@rappahannockunitedway.org</a>
<b>Agency Main Contact:</b>	Sarah Walsh
<b>Title:</b>	Director, Community Impact
Telephone Number:	(540) 373-0041 x315
E-Mail Address:	<a href="mailto:swalsh@rappahannockunitedway.org">swalsh@rappahannockunitedway.org</a>

### Agency General Information

**Agency Mission:**

To improve lives by mobilizing the caring power of our community.

**Number of years agency has been in operation:** 74 years

**Localities Served:** Spotsylvania, Stafford, King George, Caroline counties and the City of Fredericksburg.

### Agency Financial Information

List Programs	Personnel Expenses	Benefits	Operating Expenses	Total Program Budget	Requested from Spotsylvania
1. Tax Program	37,650	5,406	30,321	73,377	1,000
2. Volunteer Services	37,740	9,011	26,261	73,012	1,000
3. Information Services	2,282	485	12,579	15,346	1,000
4. RUW (other) Programs	233,130	48,544	102,302	383,976	0
5. RUW Fundraising	161,099	28,145	155,860	345,104	0
<b>Agency Administration:</b>	170,135	38,909	73,488	282,532	0
<b>Capital Outlay:</b>					0
<b>Total Agency Budget:</b>	<b>642,036</b>	<b>130,500</b>	<b>400,811</b>	<b>1,173,347</b>	<b>-</b>

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.

<b>Attachment Checklist:</b> <i>(include ONE copy of each)</i>	<input checked="" type="checkbox"/> IRS 501(c)(3) Letter	<input checked="" type="checkbox"/> Audit Report <i>(with Audit Management Letter)</i>	<input checked="" type="checkbox"/> Current Financial statement	<input checked="" type="checkbox"/> IRS 990
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<input checked="" type="checkbox"/> Accountant Contact Information.	<input checked="" type="checkbox"/> Organizational Chart	<input checked="" type="checkbox"/> Current Board Roster <i>(with contact information)</i>	<input checked="" type="checkbox"/> Agency's Current Strategic Plan
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<b>Agency Director's Signature:</b> 	<b>Date:</b> 10/07/2013
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**Spotsylvania County**

Partner Agency Funding Application FY 2015

Agency Name:

Rappahannock United Way

If your agency is requesting an increase or decrease in funding as shown on the Agency Financial Information Chart included on the Face Sheet, please describe, in detail, the reasons for these changes, in each category below for the Agency as a whole. Program specific increases can be given under the program descriptions in the next section. (The individual descriptions should not exceed 20 lines of text.)

**Agency Administrative Expenses (to include funding increases for personnel (new positions, merit and/or COLA increases):**

N/A

**Capital Outlay:**

N/A

2015/01/03

**Spotsylvania County**  
Partner Agency Funding Application FY 2015

**Agency Name:**  
 Rappahannock United Way

**Historical Budget Information**

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

	FY 2013 Actual	FY 2014 Budgeted	FY 2015 Projected
Caroline	0	0	0
Fredericksburg	3,000	3,000	3,000
King George	1,560	1,560	1,560
Spotsylvania	5,000	3,000	3,000
Stafford	2,737	2,737	2,737
United Way Grant	4,829	10,000	15,000
Grants	29,765	45,350	60,000
Client Fees	167,910	0	170,000
Fundraising (RUW)	1,760,650	1,900,000	2,125,000
Other (explain below)	56,677	66,450	75,000
<b>Total Agency Revenue</b>	<b>2,032,128</b>	<b>2,032,097</b>	<b>2,455,297</b>

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

**Other Revenue =**

- Registration Fees for Special Training / Recognition Events \$23,938
- Interest Income \$4,667
- Miscellaneous \$28,072

**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.

**Spotsylvania County**  
Partner Agency Funding Application FY 2015

**Agency Name:**  
 Rappahannock United Way

**Application Checklist**

<b>Items to be completed</b>	<b>Comments:</b>
✓ Face Sheet	
✓ Program Name	
✓ Program Purpose/Description	
✓ Justification of Need	
✓ Target Audience	
✓ Service Area	
✓ Service Delivery	
✓ Client Fees	
✓ Budget Information	
✓ Goals and Objectives	
✓ Program Goal	
✓ Most Recent Data Chart	

# Spotsylvania County

Partner Agency Funding Application FY 2015

Program Name:

Information Services

**Each agency submitting a funding request must fill out the following pages for each program serving Spotsylvania County Citizens 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. Spotsylvania County reserves the right to request additional information once the application has been submitted.**

Program Name:	Information Services	Is this a new program?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Program Contact:	Sarah Walsh	Title:	Director, Community Impact
Telephone Number:	540-373-0041 ext. 315		
E-Mail Address:	swalsh@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 Spotsylvania County and why the Board of Supervisors should consider this funding request. If this is a new program, be sure to include the benefit to the County 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 Spotsylvania 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 **5,660 individuals** used 2-1-1 last year - **34% were Spotsylvania residents**.

More than **30,000 individuals** last year (25% Spotsylvania residents) 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. Target Audience:** *(The following should describe the specific population targeted by the program and should not exceed 5 lines of text.)*

The target audience is Planning District 16 with a particular focus on local businesses, churches, schools, nonprofit organizations, and private and public service providers serving individuals and families in need.

Program Name:

Information Services

### Spotsylvania County

#### Partner Agency Funding Application FY 2015

**4. Service Area:** (Please describe the program's intended geographic service area. This may include entire regions, localities, or specific schools, neighborhoods, etc.)

Rappahannock United Way's Information Services serves Planning District 16 with a particular focus on low income neighborhoods and employers.

**5. Service Delivery:** (Please state the geographic location of the service, the duration and frequency offered to the clients.)

Rappahannock United Way's Information Services provides services to Planning District 16 year round, Monday through Friday during business hours. For those seeking assistance outside business hours, they will be connected to 2-1-1 Virginia, which operates 24 hours a day, 7 days a week, 365 days a year.

**6. 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 client fees.

**7. 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.)

	FY 2013 Actual	FY 2014 Budgeted	FY 2015 Projected
Caroline	0	0	0
Fredericksburg	1,000	1,000	1,000
King George	1,000	1,000	1,000
Spotsylvania	1,667	1,000	1,000
Stafford	912	912	912
United Way Grant	0	0	0
Grants	5,500	2,500	2,500
Client Fees	0	0	0
Fundraising (RUW)	5,267	8,934	8,934
Other	0	0	0
<b>Total Program Budget</b>	<b>15,346</b>	<b>15,346</b>	<b>15,346</b>

Please indicate, in detail, reasons for increases or decreases in the amounts requested for FY 2014. 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 note if any increase is sought for new positions or personnel, please explain in detail.

Rappahannock United Way has submitted a request for level funding for the amount of \$1,000 for Information Services. The funding amount requested is under 1% of the total agency operating costs.

Rappahannock United Way has continued to receive funding support from Spotsylvania 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 Rappahannock United Way continues to serve a greater number of Spotsylvania residents each year, we have not requested an increase in funds in line with this growth. Rappahannock United Way understands that the need in our community is great and the funds to address those needs are limited.

Program Name:

Information Services

## Spotsylvania County

Partner Agency Funding Application FY 2015

**8. 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.

# Spotsylvania County

Partner Agency Funding Application FY 2015

Program Name:

Information Services

**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 Nonprofit Capacity Builder 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.

**9. 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, 2012 – June 30, 2013

### Objective 1a.

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

**5,660 callers (10% increase)** to 2-1-1 from Planning District 16.

### 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 **12,398 individuals** about Community Resources, 2-1-1 Virginia and Charity Tracker; a **21% increase** over last year.

### Objective 2a.

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

Information about available resources was presented to **485 representatives** from **community organizations and businesses**. A **24 % increase** over last year.

### 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 **90 local agencies** were registered to use Charity Tracker. **25% increase** over last year.

## Spotsylvania County

Partner Agency Funding Application FY 2015

Program Name:

Information Services

**10. 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 90 to 95 organizations – an increase of 5%.*

**Spotsylvania County**  
 Partner Agency Funding Application FY 2015

Program Name:

Information Services

Program Service Data:

Service Period: 07/01/2012 to

06/30/2013

Locality Served	Total Served		Gender										Race				
	FY 2013	FY 2015*	Male	Female	Unknown	Caucasian	African American	Asian	Hispanic	American Indian	Other	Unknown	Hispanic	American Indian	Other	Unknown	
Fredericksburg	2,432	2,500	486	1,897	49	624	1,164	1	190	15	422						
Caroline	3,048	3,250	748	1,803	497	696	1,160	0	60	5	1,113						
King George	2,337	2,725	690	1,607	40	844	1,050	0	36	1	402						
Spotsylvania	7,814	8,000	1,643	5,530	641	3,023	1,445	26	416	28	2,867						
Stafford	5,480	5,750	1,323	4,065	92	2,661	1,417	21	376	36	904						
Other	9,805	9,000	1,454	4,133	4,218	1,824	2,143	8	308	72	5,430						
<b>Total</b>	<b>30,916</b>	<b>31,225</b>	<b>6,344</b>	<b>19,035</b>	<b>5,537</b>	<b>9,672</b>	<b>8,379</b>	<b>56</b>	<b>1,386</b>	<b>157</b>	<b>11,138</b>						

\*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	19-24	26-40	41-60	65+	Other Unknown	Under \$10,000	\$10,000 - \$19,000	\$20,000 - \$39,000	\$40,000 - \$59,000	Over \$60,000	Other Unknown
Fredericksburg	176	292	137	179	257	508	516	155	212	308	230	116	29	0	1,749
Caroline	228	355	165	243	280	472	705	417	183	1,028	729	260	9	14	1,008
King George	177	326	133	180	213	414	519	234	141	391	285	163	5	0	1,493
Spotsylvania	452	805	407	587	586	1,155	1,309	510	2,003	775	838	501	13	24	5,663
Stafford	469	913	456	569	475	1,085	972	331	210	602	302	210	26	3	4,337
Other	643	1,063	462	756	906	1,927	2,239	894	915	757	688	251	13	0	8,096
<b>Total</b>	<b>2,145</b>	<b>3,754</b>	<b>1,760</b>	<b>2,514</b>	<b>2,717</b>	<b>5,561</b>	<b>6,260</b>	<b>2,541</b>	<b>3,664</b>	<b>3,861</b>	<b>3,072</b>	<b>1,501</b>	<b>95</b>	<b>41</b>	<b>22,346</b>

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.

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

# Spotsylvania County

Partner Agency Funding Application FY 2015

Program Name:

Tax Services

**Each agency submitting a funding request must fill out the following pages for each program serving Spotsylvania County Citizens 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. Spotsylvania County reserves the right to request additional information once the application has been submitted.**

Program Name:	Tax Services	Is this a new program?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Program Contact:	Sarah Walsh	Title:	Director of 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 who make less than \$52,000 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 credit counselors.

**2. Justification of Need:** *(Please state clearly why this service should be provided to the citizens of Spotsylvania County and why the Board of Supervisors should consider this funding request. If this is a new program, be sure to include the benefit to the County 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 shows that 10% of Spotsylvania County families with children live in poverty and that 8.4% of all people living in Spotsylvania 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 several hundred individuals eligible for the credit in Spotsylvania that have never claimed it. The Coalition wants to help those eligible in Spotsylvania 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 Spotsylvania.

**3. Target Audience:** *(The following should describe the specific population targeted by the program and should not exceed 5 lines of text.)*

Low to moderate-income individuals and families throughout Planning District 16:

- Families - \$45,060 (\$50,270 married filing jointly) with three or more qualifying children
- Families - \$41,952 (\$47,162 married filing jointly) with two qualifying children
- Families - \$36,920 (\$42,130 married filing jointly) with one qualifying child
- Couples - \$13,980 (\$19,190 married filing jointly) with no qualifying children

**Spotsylvania County**  
Partner Agency Funding Application FY 2015

<b>Program Name:</b>
Tax Services

**4. Service Area:** (Please describe the program's intended geographic service area. This may include entire regions, localities, or specific schools, neighborhoods, etc.)

Our service area is Planning District 16 with a particular focus on low income neighborhoods and employers. The busiest tax site is actually located within Spotsylvania County.

**5. Service Delivery:** (Please state the geographic location of the service, the duration and frequency offered to the clients.)

Tax sites will be open from mid-January through mid-April every tax season. Tax sites operate Monday through Thursday from 9am to 8pm, and Fridays and Saturdays from 9am to 5pm. Tax sites will be located throughout Planning District 16. They will include (but are not limited to) library branches, churches, Thurman Brisben Center, Virginia Employment Commission, Rappahannock United Way, academic institutions and low income apartment complexes and group homes in the area. **Financial stability events will be held throughout the year.**

**6. 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 client fees.

**7. 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.)

	FY 2013 Actual	FY 2014 Budgeted	FY 2015 Projected
Caroline	0	0	0
Fredericksburg	1,000	1,000	1,000
King George	0	0	0
Spotsylvania	1,667	1,000	1,000
Stafford	912	912	912
United Way Grant	4,829	10,000	10,000
Grants	37,402	37,402	37,402
Client Fees	0	0	0
Fundraising (RUW)	27,567	23,063	23,063
Other	0	0	0
<b>Total Program Budget</b>	<b>73,377</b>	<b>73,377</b>	<b>73,377</b>

**Please indicate, in detail, reasons for increases or decreases in the amounts requested for FY 2015. 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 note if any increase is sought for new positions or personnel, please explain in detail.**

Rappahannock United Way has submitted a request for level funding for the amount of \$1,000 for Tax Services. The funding amount requested is under 1% of the total agency operating costs.

Rappahannock United Way has continued to receive funding support from Spotsylvania 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 Rappahannock United Way continues to serve a greater number of Spotsylvania residents each year, we have not requested an increase in funds in line with this growth. Rappahannock United Way understands that the need in our community is great and the funds to address those needs are limited.

**8. 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 Tax Services aims to increase the financial assets of low to moderate income workers through free tax preparation assistance and claiming tax credits. This will enhance their ability to independently support themselves and their families.

**Objectives:**

<b>1a.</b>	Increase the number of participants receiving Earned Income Tax Credits and/or other tax credits by 12% from the previous year.
<b>1b.</b>	Increase the overall dollar amount of tax refunds by 8% from the previous year's amount.

**Program Goal 2:**

Participants in financial education events gain the knowledge to improve their financial self-sufficiency and independence.

**Objectives:**

<b>2a.</b>	Increase the number of tax site participants who participate in financial education events and surveys.
<b>2b.</b>	Increase the number / percentage of individuals who report they will save their tax credit / refund or pay off debt.

**Spotsylvania County**  
**Partner Agency Funding Application FY 2015**

Program Name:

Tax Services

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

Tax Services 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.

Participants will be surveyed at the beginning and end of all financial literacy events. These pre and post surveys will evaluate their understanding of financial stability before and after the event.

Evaluations and reports will be administered by tax site volunteers and assessed by the Financial Stability Coordinator and RUW's Community Impact team.

**9. 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, 2012 – June 30, 2013

**Objective 1a.**

**1,261 households received free tax preparation assistance** through Tax Services. This is an **18% increase** over last year.

Taxpayers helped at the Tax Services free sites received **\$1.7 million in refunds**. An 8% increase over last year.

**Objective 1b.**

**365 households** were eligible for and received the Earned Income Tax Credit, totaling more than **\$572,391 in refunds**. This is a 16% increase over last year. Taxpayers helped at the free tax sites received an average EITC refund of \$1,607.

**365 families** were eligible for the Child Tax Credit (CTC) and received more than **\$256,002 in CTC refunds**.

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

**Objective 2a.**

151 individuals participated in financial stability events and completed surveys at tax site – Financial Freedom events.

**Objective 2b.**

84% (112 out of 150 surveyed) said they would use their tax refunds to pay off debt.

**10. 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:**

Currently, RUW is in the planning stages for the 2013 / 2014 tax season. This year will be more successful than previous years. RUW has established more tax sites and is recruiting more volunteers for Tax Services. A major emphasis will be placed on ensuring Tax Services are readily available to all of Planning District 16. Marketing strategies will be deployed to encourage low to moderate-income individuals and families to utilize free Tax Services – tax preparation and financial education services.

RUW is extremely excited to continue partnerships with Intuit, Germanna Community College and Rappahannock Goodwill Industries. These partnerships will provide tax site volunteers who will assist individuals in preparing their own taxes using the Free Self-Assisted tax preparation website. This will increase the number of clients served throughout tax season. By teaching individuals how to prepare their own taxes, we will increase their financial self-sufficiency.

Considering the state of the economy and the increased number of participants each year, RUW believes more Spotsylvania residents will utilize our tax program. RUW is prepared to provide excellent service and assist the residents of Spotsylvania with tax assistance.

RUW will target low income employees through social service organizations, faith-based groups, etc. These partnerships enable us to reach and serve more low to moderate-income clients than ever before.

This year RUW plans to serve **1,400 low to moderate- income individuals** – an 11% increase over last year.

**Program Goal 2:**

Several companies are partnering with Tax Services to increase the number of financial literacy events in the Planning District region. This year, partnerships with Quin Rivers, Union First Market Bank, Wells Fargo, Virginia Credit Union, ClearPoint Credit Counseling Solutions, SunTrust, Germanna Community College, Rappahannock Goodwill Industries and Intuit will continue. These partnerships will ensure RUW Tax Services will assist more people than ever before. Quin Rivers will also provide credit reports, counseling and budgeting information at many tax sites this upcoming tax season.

With the continuing weak economy, more families are in financial crisis. This creates an increased and more urgent need for free tax preparation assistance and financial education tools and resources. RUW plans to hold several financial education events this year at the busiest tax site locations. These events will offer workshops on the importance of maintaining a credit score and how to spend money wisely. Free credit reports and one-on-one financial counseling will be offered free of charge to all participating individuals.

RUW is excited and ready to provide more financial stability education opportunities throughout the local community this year. This year we plan to serve **200 individuals at 6 financial education events** – a 25% increase over last year.

**Spotsylvania County**  
**Partner Agency Funding Application FY 2015**

Program Name:  
**Tax Services**

Program Service Data:		Service Period: 07/01/2012		to 06/30/2013								
Locality Served	Total Served		Race									
	FY 2013	FY 2015*	Male	Female	Unknown	Caucasian	African American	Asian	Hispanic	American Indian	Other	Unknown
Fredericksburg	332	375										
Caroline	50	75										
King George	60	75										
Spotsylvania	324	350										
Stafford	361	375										
Other	134	150										
<b>Total</b>	<b>1261</b>	<b>1400</b>	<b>0</b>	<b>0</b>	<b>1261</b>	<b>335</b>	<b>293</b>	<b>26</b>	<b>249</b>	<b>3</b>	<b>355</b>	<b>0</b>

\*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	19-24	26-40	41-60	65+	Other Unknown	Under \$10,000	\$10,000 - \$19,000	\$20,000 - \$39,000	\$40,000 - \$59,000	Over \$60,000	Other Unknown
Fredericksburg															
Caroline															
King George															
Spotsylvania															
Stafford															
Other															
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>28</b>	<b>180</b>	<b>267</b>	<b>458</b>	<b>328</b>	<b>0</b>	<b>378</b>	<b>290</b>	<b>441</b>	<b>118</b>	<b>34</b>	<b>0</b>

If any of the above information is not available, please indicate why:

While we did collect data on gender, race, age, and income level this year, we are prohibited by the IRS from reporting the locality in which clients reside. The IRS does not allow local tax programs to pull information on the demographics we are serving in each locality.

The IRS tax software used does not allow us to pull information on income; however, the Tax Program is only able to serve individuals and families who make an annual income of less than \$51,000. (NOTE – the 34 with income over \$60k used the online system with higher income requirements.)

**Spotsylvania County**  
Partner Agency Funding Application FY 2015

Program Name:

Volunteer Services

**Each agency submitting a funding request must fill out the following pages for each program serving Spotsylvania County Citizens 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. Spotsylvania County 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:	Patricia Wolfrey	Title:	Director, Resource Development
Telephone Number:	540-373-0041 ext. 304		
E-Mail Address:	pwolfrey@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 Spotsylvania County and why the Board of Supervisors should consider this funding request. If this is a new program, be sure to include the benefit to the County 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 Spotsylvania County 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 Spotsylvania County. 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 **9,600 volunteers**, contributing more than **132,000 hours** of volunteer time, at a total value of roughly **\$3 million worth of time invested into our local community**. This investment of time and volunteer talent saves the tax payers of Spotsylvania County while making the County a better place to live and do business.

**3. Target Audience:** *(The following should describe the specific population targeted by the program and should not exceed 5 lines of text.)*

The community as a whole:

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

**Spotsylvania County**  
Partner Agency Funding Application FY 2015

**Program Name:**  
 Volunteer Services

**4. Service Area:** *(Please describe the program's intended geographic service area. This may include entire regions, localities, or specific schools, neighborhoods, etc.)*

Volunteer Services serves Planning District 16 with a focus on youth, employees, family, and faith based volunteers.

**5. Service Delivery:** *(Please state the geographic location of the service, the duration and frequency offered to the clients.)*

Volunteers are recruited and matched for volunteer opportunities, events and projects throughout Planning District 16. Rappahannock United Way's Volunteer Center operates 24 hours a day, 365 days a year through the utilization of an online volunteer database/website. Many of our local nonprofits provide services to our community and rely on volunteers to assist them in this service delivery. RUW also has a Volunteer Coordinator on staff that can help individuals interested in volunteering find the perfect volunteer opportunity – 5 days a week 8:00am-4:30pm.

**6. 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 client fees.

**7. 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.)*

	FY 2013 Actual	FY 2014 Budgeted	FY 2015 Projected
Caroline	0	0	0
Fredericksburg	1,000	1,000	1,000
King George	560	560	560
Spotsylvania	1,667	1,000	1,000
Stafford	912	912	912
United Way Grants	0	0	0
Grants	0	2,500	2,500
Client Fees	0	0	0
Fundraising (RUW)	68,873	67,040	67,040
Other	0	0	0
<b>Total Program Budget</b>	<b>73,012</b>	<b>73,012</b>	<b>73,012</b>

**Please indicate, in detail, reasons for increases or decreases in the amounts requested for FY 2015. 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 note if any increase is sought for new positions or personnel, please explain in detail.**

Rappahannock United Way has submitted a request for funding for the amount of \$1,000 for its Volunteer Services program. The funding amount requested is less than 1% of the total agency operating costs.

Rappahannock United Way has continued to receive funding support from Spotsylvania 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 Rappahannock United Way continues to serve a greater number of Spotsylvania residents each year, we have not requested an increase in funds in line with this growth. Rappahannock United Way understands that the need in our community is great and the funds to address those needs are limited.

# Spotsylvania County

Partner Agency Funding Application FY 2015

Program Name:

Volunteer Services

**8. 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.	To recruit and match volunteers of diverse ages, skills, abilities and backgrounds with volunteer events, projects and opportunities with local nonprofit organizations.  Goal: 11,000 – 10% increase in volunteers over the previous year.
1b.	To ensure volunteers have a positive and rewarding experience when engaged in volunteering.  95% of volunteers report a positive experience when engaged in volunteering.

### 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.	Nonprofit agency staff (including public schools and faith-based organizations) will acquire the skills necessary to recruit, engage, and retain volunteers.  To provide 4 volunteer training and networking opportunities.  90% satisfaction rate for volunteer trainings and meetings. 10% increase in the number of attendees over the previous year. Individualized assistance to smaller organizations and/or staff who are new to their roles.
2b.	Nonprofit agencies, local schools and faith based organizations will utilize the Volunteer Website to better recruit and manage volunteers.  25% increase in the number of registered active agencies on Volunteer Website.

**Spotsylvania County**

**Partner Agency Funding Application FY 2015**

Program Name:

Volunteer Services

**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](http://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.

**9. 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, 2012 – June 30, 2013

**Objective 1a.**

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

**9,066 volunteers engaged;** a 14% decrease from the prior year.

**NOTE** the transition to a new volunteer website during the reporting timeframe, resulted in a period of several months when volunteer data could not be tracked/compiled.

**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 who acquire volunteer management skills by successfully completing Volunteer Management Training and attend volunteer networking meetings.

**7 volunteer trainings** were held, 348 participants, 2% increase in participants from last year

**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. 75% of agencies reported an improvement in developing existing skills.

## Spotsylvania County

Partner Agency Funding Application FY 2015

Program Name:

Volunteer Services

**10. 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 fourth annual King George Day of Caring, the third annual Caroline Day of Caring, and the twentieth annual Fredericksburg Day of Caring (for Stafford, Spotsylvania, 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. Although RUW Volunteer Services was not able to track volunteer data for a period of several months during the transition to a new online Volunteer Website, it is believed that volunteer engagement levels remain high, if not higher than ever before.

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 **10,900 volunteers**. An increase of **20% 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.

Switching to a 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 **175 active organizations** using the Volunteer Website. An **increase of 25%** over the previous year.

**Spotsylvania County**  
**Partner Agency Funding Application FY 2015**

Program Name:

Volunteer Services

Program Service Data: Service Period: 07/01/2012 to 06/30/2013

Locality Served	Total Served		Gender					Race				
	FY 2013	FY 2015*	Male	Female	Caucasian	African American	Asian	Hispanic	American Indian	Other		
Fredericksburg	923	1,300										
Caroline	42	200										
King George	112	250										
Spotsylvania	1,034	1,450										
Stafford	987	1,200										
Other	5,968*	6,500										
<b>Total</b>	<b>9,066</b>	<b>10,900</b>										

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	18-25	25-40	40-60	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													
<b>Total</b>													Not Given

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.