

Regional Funding

Fiscal Year 2020 - Partner Funding Application

Rappahannock United Way

Agency Information

General Information

Agency Name Rappahannock United Way
Physical Address 3310 Shannon Park Drive, Fredericksburg, VA, 22408, U.S.A.
Mailing Address 3310 Shannon Park Drive, Fredericksburg, VA, 22408
Agency Phone Number (540) 373-0041
Federal Tax ID # 54-6042936
Web Address <http://www.rappahannockunitedway.org>
Agency Email Address info@rappahannockunitedway.org

Agency Mission Statement

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

Number of Years in Operation 79

Main Contact

Main Contact Sarah Walsh, phone: (540) 373-0041 x315, email: swalsh@rappahannockunitedway.org
Job Title Vice President - Strategic Initiatives

Localities Served

Please select any/all localities your agency serves.

Caroline
Fredericksburg
King George
Spotsylvania
Stafford

Collaborative Impact

Describe in detail how the community would be impacted if your agency were dissolved or merged with another partner agency.

If Rappahannock United Way were to dissolve, the negative impact on the community and the many nonprofits that serve our area would be significant.

A direct consequence to the community would be the loss of RUW direct services such as our Free Tax Preparation program. Currently, no other agency is in the position to assume the responsibilities of the VITA Free Tax program. Were this program to cease, over 2,000 local residents would lose Free Tax Preparation and possibly lose the refunds and credits to which they are entitled. Tax Preparation fees average \$225 per return. For low income families, this is a significant amount of money - an amount that could prevent them from filing, causing even more financial trouble. Given the changes in our tax code, more and more people are seeking tax expertise when completing their returns, and they simply cannot afford to pay preparers.

Beyond direct services for the citizens of our community, supportive collaboration and cooperation between local nonprofits would be seriously impacted. RUW coordinates the Rappahannock Regional Financial Stability Coalition and participates in several other collaborations in the region. These efforts, along with our efforts to raise and grant funds that tackle issues in a coordinated manner, serve to build capacity of local agencies and networks. Loss of this collaboration and support would impact nonprofits and the people they serve.

Community Impact

Please provide at least 2 examples of how your services have impacted members of our community.

Example 1

When Carmen Midence started having car problems and needed to buy a new vehicle, the money she had been saving came in handy.

“This money in savings is helping to buy a new car,” said Midence, explaining that her husband was pleasantly surprised at how much she had been able to save. “It’s good. It makes me feel happy.” How did she do it?

Last year Midence began attending a Financial Life Skills class funded by Rappahannock United Way. After filling out a budgeting worksheet, she decided to make some changes to reduce her family’s household expenses.

“I was paying \$50 for the phone, but now I pay \$20,” said Midence, who found ways to cut monthly bills during her class held at Stafford Junction. “I save money using coupons and I buy for two weeks, not every week, so I don’t buy extra I don’t need.”

For students like Midence, getting in the habit of putting money aside is key.

“Always pay yourself,” said Jose Torres, of Wells Fargo, after co-teaching a session on budgeting to Midence and a group of other women. “Anytime you get paid, transfer money into a savings account. Even if it’s five dollars, eventually you will see results.”

Wells Fargo Personal Banker Andres Mercado encouraged the class to think about where they want to be

financially a year from now and then in five years.

“Saving a little bit is better than saving nothing,” said Andres, who said some people in the class had never thought about writing down their expenses and appreciated the budgeting worksheet that broke their spending into categories. “You can see on paper where you can trim the fat. It’s an eye opener.”

Midence was thankful for the opportunity to attend the free financial classes with a group of her peers.

“I am very grateful for this program because it helps you grow,” said Midence, who is able to attend the classes while her 3-year-old son plays in an adjacent room. “I don’t know where else I can find a place like this. I love it.”

Example 2

Karen Smith* found out about RUW’s free Financial Check-Ups when visiting one of our free Tax Preparation Sites earlier this year. Ms Smith worked full time but had been turned down for promotion at her job because she could not secure the necessary security clearance required. She found out that this was due to her having a bad credit history. Ms Smith did not really understand what this meant or how to go about fixing it. When she saw the information at one of our Tax Sites about Free Financial Check-Ups she jumped at the chance to make an appointment. She met with the RUW Financial Coach and explained her situation. The Financial Coach was able to access Ms Smith’s credit reports online right there and then. They spent some time reviewing it together and Ms Smith realized there were some items on there that actually belonged to an old roommate not her and they were having a negative impact on her credit score. The Financial Coach explained how she could dispute the items with the credit companies and even gave her a copy of a template letter to send them.

Using this information Ms Smith was able to remove the incorrect items from her credit history, restore her credit score and then ultimately achieve the security clearance she needed. A few months later we were delighted to hear from Ms Smith that she now has a new job and a significant pay increase!

*Name changed at client's request.

Example 3 (Optional)

Rappahannock United Way

Agency Budget Narrative

Administrative Expenses

Provide an overview of the administrative costs for your agency.

Rappahannock United Way does not use locality funds for administrative costs.

If your agency is requesting an increase or decrease in administrative funding, please describe in detail the reasons for these changes.

N/A

Please provide justification for and specific amounts of administrative costs that are defrayed by locality funds.

N/A

Capital Expenses

Please provide an overview of the capital costs for your agency.

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

Please provide justification for and specific amounts of capital costs that are defrayed by locality funds.

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Salary & Benefit Expenses

Please provide an overview of any increases or decreases in general personnel expenses for your agency.

Rappahannock United Way does not project any significant increases or decreases in general personnel expenses for FY2020.

Please provide a description of any changes to agency benefits structure or cost.

N/A

Budget Issues

Provide any legislative initiatives or issues that may impact the agency for the upcoming year.

There are no legislative initiatives or issues that Rappahannock United Way is aware of that may impact the agency for this upcoming year.

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.

We are not aware of any outside funding sources that will expire or be reduced.

Please detail any identified agency needs or areas of concern that are currently not being addressed in your funding request.

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.

Rappahannock United Way

Agency Total Budget

In the boxes below provide an overview of the administrative costs associated with your total agency budget.

Expenses

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Salary	631,055.68	739,322.00	673,675.00	745,025.36	745,025.36
Benefits	107,203.78	135,380.00	123,646.00	151,514.58	151,514.58
Operating Expenses	972,599.95	881,040.00	1,052,538.00	838,523.06	838,523.06
Capital Expenses	48,453.07	47,000.00	46,709.00	47,000.00	47,000.00
Other Expenses	152,136.61	198,702.00	200,369.00	155,025.00	155,025.00
Total	1,911,449.09	2,001,444.00	2,096,937.00	1,937,088.00	1,937,088.00

Revenues

Please include revenue associated with your entire organization. This section represents the TOTAL revenue your organization is receiving. The revenue associated with specific programs will be listed within your program budgets; this section represents total revenues. (For example if your organization requests funding for multiple programs the total amount requested from each locality or other entities goes within this section)

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Caroline					
Fredericksburg	3,000.00	3,000.00	3,000.00	3,000.00	3,000.00
King George					
Spotsylvania	4,000.00	0.00		3,000.00	3,000.00
Stafford	2,737.00	2,737.00	2,737.00	2,600.00	2,737.00
United Way					
Grants	93,700.25	81,120.00	86,353.00	83,519.00	83,519.00
Client Fees	118,920.45	41,000.00	50,603.00	41,000.00	41,000.00
Fundraising	1,597,481.84	1,570,605.00	1,693,093.00	1,703,137.00	1,703,000.00
Other (Click to itemize)	91,609.55	302,982.00	261,151.00	100,832.00	100,832.00

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Total	1,911,449.0 9	2,001,444.0 0	2,096,937.00	1,937,088.00	1,937,088.00

Surplus / Deficit

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Surplus or Deficit	0.00	0.00	0.00	0.00	0.00

Rappahannock United Way

Locality Information

Locality Notes

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

Caroline County

10% of individuals served by RUW services and funded programs are allocated to Caroline County residents.

Tax Preparation services are offered at the Caroline YMCA. At all sites, 127 returns were prepared for Caroline residents for tax year 2017.

Caroline Day of Action volunteer projects included Gracie's Gowns and Caroline Habitat for Humanity.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$50,000 worth of assistance to 394 households with a total of 1281 members.

286 individuals from Caroline accessed 211 for information and referral services.

City of Fredericksburg

12% of individuals served by RUW services and funded programs are allocated to Fredericksburg residents.

Tax Preparation services are offered at Headquarters Library. At all sites, 329 returns were prepared for Fredericksburg residents for tax year 2017.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$91,000 worth of assistance to 464 households with a total of 1412 members.

812 individuals from Fredericksburg accessed 211 for information and referral services.

King George County

7% of individuals served by RUW services and funded programs are allocated to King George County residents.

Tax Preparation services are offered at 2 King George sites. At all sites, 160 returns were prepared for King George residents for tax year 2017.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$105,450 worth of assistance to 740 households with a total of 2143members.

217 individuals from King George accessed 211 for information and referral services.

Spotsylvania County

29% of individuals served by RUW services and funded programs are allocated to Spotsylvania County residents.

Tax Preparation services are offered at RUW, located in Spotsylvania. At all sites, 556 returns were prepared for Spotsylvania residents for tax year 2017. Spotsylvania residents comprised 28% of all tax clients (the highest percentage for PD16). Our primary tax site is located in Spotsylvania, and both days of our BB&T Tax Bus service were held in Spotsylvania.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$229,725 worth of assistance to 1163 households with a total of 4448 members. (the highest number of clients tracked in PD16).

1,176 individuals from Spotsylvania accessed 211 for information and referral services. (Highest number in PD16)

Stafford County

18% of individuals served by RUW services and funded programs are allocated to Stafford County residents.

Tax Preparation services are offered at two Stafford Libraries. 459 returns were prepared for Caroline residents for tax year 2017. This represents 23% of all tax returns.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$128,962 worth of assistance to 1025 households with a total of 3409 members.

1,145 individuals from Stafford accessed 211 for information and referral services.

Rappahannock United Way - Free Tax Preparation and Financial Coaching

Program Overview

You may save your work at any time by clicking on the "Save My Work" link/icon at the bottom or top of the page.

When you have completed all questions on the form, select the "Save My Work and Mark as Completed" link/icon at the bottom or top of this page.

You may also SWITCH between forms in this application by using the SWITCH FORMS feature in the upper right corner. When switching forms, any updates to the existing form will automatically be saved.

General Information

Program Name Free Tax Preparation and Financial Coaching

Is this a new program? No

Program Contact

Name Andrea Benavides

Title Financial Stability Manager

Email ABenevides@rappahannockunitedway.org

Phone (540) 373-0041 x309

Program Purpose / Description

Provide an overview of this program

Rappahannock United Way provides a variety of financial stability services in conjunction with our Free Tax Preparation program. RUW educates low to moderate-income workers about tax credit eligibility, provides free tax preparation services, and provides free financial coaching to individuals and families of Planning District 16.

RUW employs a Financial Stability Coordinator (FT), who manages Tax Services for the Coalition. RUW also employs part-time Tax Site Coordinators to ensure the highest level of tax service. RUW recruits, trains and facilitates IRS certification of volunteers who prepare and file tax returns for individuals and families with a household income of less than \$66,000 per year and to provide financial coaching.

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. Each low- to moderate-income family that utilizes Free Tax services saves an average of \$225 in tax preparation fees, and hundreds of families receive refunds and tax credits that increase their financial stability.

Clients can also access trained financial coaches and credit reports at tax sites throughout the region.

Volunteer financial coaches are available at several sites, along with Affordable Care Act navigators and representatives of local nonprofits.

Client Fees

Please describe the fees clients must pay for the services by this program.

All services are provided free of charge.

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.

In our area, our poverty rate average of 12.6% of families (10% of whom have children) is holding steady. A variety of tax credits are available to local filers, but many of those credits go unclaimed each year, resulting in millions of dollars lost by thousands of local individuals. In addition to those affected by poverty, many local families are considered to be "ALICE", or Asset Limited, Income Constrained, Employed. ALICE families qualify for very few support programs because they technically make too much money, but they are still struggling to afford basic needs and to build any savings for a rainy day. Because the Tax Preparation program serves households earning up to \$66,000* per year, ALICE individuals benefit from this program as well.

Estimated number of ALICE households, by county:

Caroline: 39%

Fredericksburg: 55%

King George: 29%

Spotsylvania: 47%

Stafford: 35%

*2017 Limit. Subject to increase by the IRS.

If this is a new program, be sure to include the benefits to the region for funding a new request.

N/A

Target Audience and Service Delivery

Describe the program's intended audience or client base and how those clients are served.

Tax preparation sites are located within each of the five localities. Tax sites are available 6 days a week during daytime and evening hours.

The primary target audience is low- to moderate-income households with less than \$66,000 income.

By offering sites at locations throughout the region, we also target rural residents with limited access to services and resources. They do not need to travel into the city to receive tax preparation services.

If your program has specific entry or application criteria, please describe it here.

The only criteria for tax preparation services is that household income is less than \$66,000. per year.

There is no income criteria for Financial Stability (coaching, training) services.

Rappahannock United Way - Free Tax Preparation and Financial Coaching

Program Budget Narrative

Please indicate in detail reasons for increases or decreases in the amounts you are requesting.

We are requesting level funding for this program.

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.

Rappahannock United Way - Free Tax Preparation and Financial Coaching

Program Specific Budget

Please provide your program specific budget below.

Expenses

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Personnel	73,283.98	76,039.68	103,055.92	135,053.32	135,053.32
Benefits	7,667.22	13,042.96	16,985.16	23,131.32	23,131.32
Operating Expenses	52,635.21	60,288.96	184,616.41	96,113.11	96,113.11
Capital Expenses					
Total	133,586.41	149,371.60	304,657.49	254,297.75	254,297.75

Revenues

This section represents revenue specifically associated with your program. Revenue that supports the implementation of your program and the services provided to the community.

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Caroline					
Fredericksburg	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
King George					
Spotsylvania	1,000.00	0.00	0.00	3,000.00	3,000.00
Stafford	913.00	913.00	866.67	913.00	913.00
United Way					
Grants	64,399.91	53,787.00	63,420.22	78,100.00	78,100.00
Client Fees					
Fundraising	66,273.50	93,671.60	239,370.60	171,284.75	171,284.75
Other (Click to itemize)	0.00	0.00	0.00	0.00	0.00
Total	133,586.41	149,371.60	304,657.49	254,297.75	254,297.75

Surplus / Deficit

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Surplus or Deficit	0.00	0.00	0.00	0.00	0.00

[View Diagram](#) Goals and Objectives

Goals

Goal: Low to moderate income individuals adopt positive financial practices.

Objectives		2017 Baseline	2017 Year End	2018 Baseline	2019 Baseline
Individuals will complete self tax preparation and filing using RUW Coached sites or free online software.	Total # Clients Served		1,992	2,080	2,000
	Total # Clients Achieved/Successful		1,992	550	2,000
	% Achieved / Successful		100	26.44	100
Individuals who receive in-person tax services will participate in free financial coaching.	Total # Clients Served		1,332		1,300
	Total # Clients Achieved/Successful		306		350
	% Achieved / Successful		22.97		26.92
Financial coaching clients access and review Credit Reports	Total # Clients Served		306		300
	Total # Clients Achieved/Successful		244		250
	% Achieved / Successful		79.74		83.33

Explanation & Overview

If your outcomes are significantly less than your stated objectives, please note any reasons why this might be the case

While we offer financial coaching services to all tax clients, we are focusing our measurements on those that participate in a full coaching session rather than learn about only one aspect of financial stability while at the tax site. As a result, some numbers of participants are lower. However, the quality of the coaching received is higher.

Updates for FY2018

Please note any changes you plan to make to the program, or the stated goals and objectives, given the data you have reported

We will continue to encourage clients to participate in one or more financial coaching sessions. We have also identified funds that can be used to assist individuals and families who find themselves in a one-time financial crisis that can be addressed through budgeting and saving.

If you are restating the goals or objectives for the prior calendar year, please include those here

Edited to clarify which clients are relevant to each goal:

Financial coaching clients access and review Credit Reports
Individuals who receive in-person tax services will participate in free financial coaching.

Goal: Low to moderate income individuals improve their financial assets.

Objectives

		2017 Baseline	2017 Year End	2018 Baseline	2019 Baseline
Individuals who qualify will utilize free tax preparation and filing services, saving an average of \$225 per household in preparation fees.	Total # Clients Served	1,989	1,992	2,000	2,000
	Total # Clients Achieved/Successful	1,989	1,992	2,000	2,000
	% Achieved / Successful	100	100	100	100
In-person tax prep Clients will pledge at least 10% of their tax credit/refund to savings accounts or paying down debt.	Total # Clients Served		1,330		1,330
	Total # Clients Achieved/Successful		18		70
	% Achieved / Successful		1.35		5.26

Explanation & Overview

If your outcomes are significantly less than your stated objectives, please note any reasons why this might be the case

Changes to tax filing software limited our ability to collect data on clients who elect to have a portion of their refund direct deposited into savings or bonds. Moving forward, we will capture that information

directly from the clients via exit survey when they complete their in-person returns.

Updates for FY2018

Please note any changes you plan to make to the program, or the stated goals and objectives, given the data you have reported

Collect savings data directly from client.

If you are restating the goals or objectives for the prior calendar year, please include those here

Edited to clarify the relevant client:

In-person tax prep Clients will pledge at least 10% of their tax credit/refund to savings accounts or paying down debt.

Rappahannock United Way - Free Tax Preparation and Financial Coaching

Number of Individuals Served

Localities

Please provide the actual numbers of individuals served in this program during FY2017 and FY2018, the estimated numbers of individuals served in FY2019 and the projected numbers of individuals served in FY2020.

Locality	FY2017 (Actual)	FY2018 (Actual)	FY 2019 Estimate	FY 2020 Projected
Fredericksburg City	368	329	330	330
Caroline County	171	127	130	130
King George County	193	160	160	160
Spotsylvania County	654	556	590	590
Stafford County	526	459	460	460
Other Localities	94	361	330	330
Total	2,006	1,992	2,000	2,000

Rappahannock United Way - Free Tax Preparation and Financial Coaching

Collaborative Impact

Efforts and Partnerships

Describe in detail examples of collaborative efforts and key partnerships between your program and the other programs or agencies in the area.

RUW formed the Rappahannock Region Financial Stability Coalition (RRFSC) in 2010 and has since served as the lead agency. Members include:

[Nonprofit organizations] Head Start, Rapp. Goodwill Industries, disAbility Resource Center, Central Virginia Housing Coalition, and RACSB.

[Social Service Agencies] All jurisdictions that make up PD16.

[Public Libraries] Central Downtown and CRRL branches, LE Smoot libraries host tax sites.

[Government Organizations] Virginia Employment Commission, Virginia Coop. Extension, King George Parks & Rec, Enroll Virginia Affordable Care navigators.

[Education Institutions] University of Mary Washington, Germanna Community College.

[Banks] Carter Bank & Trust, Wells Fargo, Virginia Credit Union, SunTrust, BB&T, 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, Gardens of Stafford.

Collaborative Impact

Describe in detail how the community would be impacted if your program were dissolved or merged with another partner agency.

As lead agency of The Rappahannock Regional Financial Stability Coalition, RUW is extremely proud of the collaborative work being done to increase financial stability in our region. Our collaborations with our member agencies allow us to quickly identify community needs and strengths and to find ways in which a variety of agencies can incorporate financial stability information into different aspects of their programming. If RUW were to dissolve or even step down as the lead agency, the availability of Free Tax Preparation services for working families in our region would be dramatically reduced and possibly eliminated altogether, as no other agency has expressed interest or ability to lead this program. RUW provides 100% of the staff and a significant portion of the physical space, all volunteer recruitment and coordination, and financial support necessary for a successful Free Tax Preparation and Financial Coaching program.

Regional Funding

Fiscal Year 2020 - Partner Funding Application

Rappahannock United Way

Agency Information

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Number of Years in Operation 79

Main Contact

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Job Title Vice President - Strategic Initiatives

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financially a year from now and then in five years.

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Example 2

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Example 3 (Optional)

Rappahannock United Way

Agency Budget Narrative

Administrative Expenses

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Salary & Benefit Expenses

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Please provide a description of any changes to agency benefits structure or cost.

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Budget Issues

Provide any legislative initiatives or issues that may impact the agency for the upcoming year.

There are no legislative initiatives or issues that Rappahannock United Way is aware of that may impact the agency for this upcoming year.

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.

We are not aware of any outside funding sources that will expire or be reduced.

Please detail any identified agency needs or areas of concern that are currently not being addressed in your funding request.

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.

Rappahannock United Way

Agency Total Budget

In the boxes below provide an overview of the administrative costs associated with your total agency budget.

Expenses

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Salary	631,055.68	739,322.00	673,675.00	745,025.36	745,025.36
Benefits	107,203.78	135,380.00	123,646.00	151,514.58	151,514.58
Operating Expenses	972,599.95	881,040.00	1,052,538.0 0	838,523.06	838,523.06
Capital Expenses	48,453.07	47,000.00	46,709.00	47,000.00	47,000.00
Other Expenses	152,136.61	198,702.00	200,369.00	155,025.00	155,025.00
Total	1,911,449.0 9	2,001,444.0 0	2,096,937.00	1,937,088.00	1,937,088.00

Revenues

Please include revenue associated with your entire organization. This section represents the TOTAL revenue your organization is receiving. The revenue associated with specific programs will be listed within your program budgets; this section represents total revenues. (For example if your organization requests funding for multiple programs the total amount requested from each locality or other entities goes within this section)

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Caroline					
Fredericksburg	3,000.00	3,000.00	3,000.00	3,000.00	3,000.00
King George					
Spotsylvania	4,000.00	0.00		3,000.00	3,000.00
Stafford	2,737.00	2,737.00	2,737.00	2,600.00	2,737.00
United Way					
Grants	93,700.25	81,120.00	86,353.00	83,519.00	83,519.00
Client Fees	118,920.45	41,000.00	50,603.00	41,000.00	41,000.00
Fundraising	1,597,481.84	1,570,605.0 0	1,693,093.0 0	1,703,137.00	1,703,000.00
Other (Click to itemize)	91,609.55	302,982.00	261,151.00	100,832.00	100,832.00

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Total	1,911,449.0 9	2,001,444.0 0	2,096,937.00	1,937,088.00	1,937,088.00

Surplus / Deficit

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Surplus or Deficit	0.00	0.00	0.00	0.00	0.00

Rappahannock United Way

Locality Information

Locality Notes

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

Caroline County

10% of individuals served by RUW services and funded programs are allocated to Caroline County residents.

Tax Preparation services are offered at the Caroline YMCA. At all sites, 127 returns were prepared for Caroline residents for tax year 2017.

Caroline Day of Action volunteer projects included Gracie's Gowns and Caroline Habitat for Humanity.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$50,000 worth of assistance to 394 households with a total of 1281 members.

286 individuals from Caroline accessed 211 for information and referral services.

City of Fredericksburg

12% of individuals served by RUW services and funded programs are allocated to Fredericksburg residents.

Tax Preparation services are offered at Headquarters Library. At all sites, 329 returns were prepared for Fredericksburg residents for tax year 2017.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$91,000 worth of assistance to 464 households with a total of 1412 members.

812 individuals from Fredericksburg accessed 211 for information and referral services.

King George County

7% of individuals served by RUW services and funded programs are allocated to King George County residents.

Tax Preparation services are offered at 2 King George sites. At all sites, 160 returns were prepared for King George residents for tax year 2017.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$105,450 worth of assistance to 740 households with a total of 2143members.

217 individuals from King George accessed 211 for information and referral services.

Spotsylvania County

29% of individuals served by RUW services and funded programs are allocated to Spotsylvania County residents.

Tax Preparation services are offered at RUW, located in Spotsylvania. At all sites, 556 returns were prepared for Spotsylvania residents for tax year 2017. Spotsylvania residents comprised 28% of all tax clients (the highest percentage for PD16). Our primary tax site is located in Spotsylvania, and both days of our BB&T Tax Bus service were held in Spotsylvania.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$229,725 worth of assistance to 1163 households with a total of 4448 members. (the highest number of clients tracked in PD16).

1,176 individuals from Spotsylvania accessed 211 for information and referral services. (Highest number in PD16)

Stafford County

18% of individuals served by RUW services and funded programs are allocated to Stafford County residents.

Tax Preparation services are offered at two Stafford Libraries. 459 returns were prepared for Caroline residents for tax year 2017. This represents 23% of all tax returns.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$128,962 worth of assistance to 1025 households with a total of 3409 members.

1,145 individuals from Stafford accessed 211 for information and referral services.

Rappahannock United Way - Information Services

Program Overview

You may save your work at any time by clicking on the "Save My Work" link/icon at the bottom or top of the page.

When you have completed all questions on the form, select the "Save My Work and Mark as Completed" link/icon at the bottom or top of this page.

You may also SWITCH between forms in this application by using the SWITCH FORMS feature in the upper right corner. When switching forms, any updates to the existing form will automatically be saved.

General Information

Program Name Information Services

Is this a new program? No

Program Contact

Name Kathryn Palmer

Title Community Impact Senior Manager

Email kpalmer@rappahannockunitedway.org

Phone (540) 373-0041 x314

Program Purpose / Description

Provide an overview of this program

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

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, Information Services also manages 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.

Client Fees

Please describe the fees clients must pay for the services by this program.

All services are provided free of charge.

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.

Information Services promotes access to community services and assistance programs available to local residents through a variety of means, including telephone assistance, Information updates via Listserv, and by producing online and printed copies of our Quick Guide. Our Quick Guide is updated monthly and lists the most frequently sought referral phone number.

2-1-1 Virginia connects individuals and agencies to local health and human services, making the search for resources less confusing by providing a streamlined and centralized resource center. Information Services works year-round to raise awareness of 2-1-1. Over 3,637 individuals used 2-1-1 last year.

The RUW Charity Tracker Network makes it easier for agencies to help local residents by providing an easy way to share information and services. Charity Tracker is the only way for Agencies outside of the Food Bank network to share information.

If this is a new program, be sure to include the benefits to the region for funding a new request.

N/A

Target Audience and Service Delivery

Describe the program's intended audience or client base and how those clients are served.

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.

If your program has specific entry or application criteria, please describe it here.

Program is available to all.

Rappahannock United Way - Information Services

Program Budget Narrative

Please indicate in detail reasons for increases or decreases in the amounts you are requesting.

We are seeking level funding for this program.

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.

No personnel is being added to this program.

Rappahannock United Way - Information Services

Program Specific Budget

Please provide your program specific budget below.

Expenses

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Personnel	9,103.01	8,796.37	9,408.81	8,796.37	8,796.37
Benefits	977.31	1,628.44	1,638.97	1,628.44	1,628.44
Operating Expenses	10,089.78	10,050.07	9,120.98	10,050.07	10,050.07
Capital Expenses					
Total	20,170.10	20,474.88	20,168.76	20,474.88	20,474.88

Revenues

This section represents revenue specifically associated with your program. Revenue that supports the implementation of your program and the services provided to the community.

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Caroline					
Fredericksburg	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
King George					
Spotsylvania	2,000.00				
Stafford	912.00	912.00	866.67	912.00	912.00
United Way					
Grants	14,299.67	3,000.00	2,099.33	1,564.20	1,564.20
Client Fees					
Fundraising	1,958.43	15,562.88	16,202.76	16,998.68	16,998.68
Other (Click to itemize)	0.00	0.00	0.00	0.00	0.00
Total	20,170.10	20,474.88	20,168.76	20,474.88	20,474.88

Surplus / Deficit

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Surplus or Deficit	0.00	0.00	0.00	0.00	0.00

[View Diagram](#) Goals and Objectives

Goals

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

Objectives		2017 Baseline	2017 Year End	2018 Baseline	2019 Baseline
The number of callers to 2-1-1 plus the number of individuals accessing 2-1-1 via the RUW website will increase in Planning District 16.	Total # Clients Served	3,935	4,330	3,400	3,800
	Total # Clients Achieved/Successful	3,935	4,330	3,400	3,800
	% Achieved / Successful	100	100	100	100
The number of individuals educated about 2-1-1 and other community resources through outreach activities will increase over last year.	Total # Clients Served	2,000	2,201	2,200	2,200
	Total # Clients Achieved/Successful	2,000	2,201	2,200	2,200
	% Achieved / Successful	100	100	100	100

Explanation & Overview

If your outcomes are significantly less than your stated objectives, please note any reasons why this might be the case

Updates for FY2018

Please note any changes you plan to make to the program, or the stated goals and objectives, given the data you have reported

We are on track to maintain or increase numbers served through our information services, but we are always looking for new opportunities to increase access to helpful information in our community.

If you are restating the goals or objectives for the prior calendar year, please include those here

Goal:

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

		2017 Baseline	2017 Year End	2018 Baseline	2019 Baseline
Increase the number of individuals, service providers, churches, schools and businesses that are educated about resources by 10% over last year.	Total # Clients Served	2,000	2,702	2,734	2,500
	Total # Clients Achieved/Successful	2,000	2,702	2,734	2,500
	% Achieved / Successful	100	100	100	100
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.	Total # Clients Served	110	108	108	108
	Total # Clients Achieved/Successful	110	108	108	108
	% Achieved / Successful	100	100	100	100

Explanation & Overview

If your outcomes are significantly less than your stated objectives, please note any reasons why this might be the case

The number of agencies using Charity Tracker to maximize efficiency has remained at 108 do to the closing of a few local providers. New agencies joined this year, which offset the decrease. While the number of providers using this system is level, the dollar amount of assistance tracked using this system increased by 15% from 2016 to 2017.

Updates for FY2018

Please note any changes you plan to make to the program, or the stated goals and objectives, given the data you have reported

We will continue to reach out to local nonprofits who need a way to track assistance outside of the food bank network.

If you are restating the goals or objectives for the prior calendar year, please include those here

Rappahannock United Way - Information Services

Number of Individuals Served

Localities

Please provide the actual numbers of individuals served in this program during FY2017 and FY2018, the estimated numbers of individuals served in FY2019 and the projected numbers of individuals served in FY2020.

Locality	FY2017 (Actual)	FY2018 (Actual)	FY 2019 Estimate	FY 2020 Projected
Fredericksburg City	4,324	5,632	4,375	4,375
Caroline County	3,938	3,952	3,938	3,938
King George County	2,714	2,917	2,714	2,714
Spotsylvania County	11,866	11,923	11,900	11,900
Stafford County	7,495	7,938	7,500	7,500
Other Localities	7,840	6,011	7,840	7,840
Total	38,177	38,373	38,267	38,267

Rappahannock United Way - Information Services

Collaborative Impact

Efforts and Partnerships

Describe in detail examples of collaborative efforts and key partnerships between your program and the other programs or agencies in the area.

The Rappahannock United Way hosts the Charity Tracker network. More than 100 local service provider organizations currently belong to the network and utilize the online client management system to ensure that donated resources are shared fairly. Network members include Departments of Social Services for all 5 localities in Planning District 16, 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.

Collaborative Impact

Describe in detail how the community would be impacted if your program were dissolved or merged with another partner agency.

Rappahannock United Way has provided the Charity Tracker network to the nonprofit community for the past 9 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 have to rely on using their own individual systems to track services provided to their clients 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 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.

Regional Funding

Fiscal Year 2020 - Partner Funding Application

Rappahannock United Way

Agency Information

General Information

Agency Name Rappahannock United Way
Physical Address 3310 Shannon Park Drive, Fredericksburg, VA, 22408, U.S.A.
Mailing Address 3310 Shannon Park Drive, Fredericksburg, VA, 22408
Agency Phone Number (540) 373-0041
Federal Tax ID # 54-6042936
Web Address <http://www.rappahannockunitedway.org>
Agency Email Address info@rappahannockunitedway.org

Agency Mission Statement

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

Number of Years in Operation 79

Main Contact

Main Contact Sarah Walsh, phone: (540) 373-0041 x315, email: swalsh@rappahannockunitedway.org
Job Title Vice President - Strategic Initiatives

Localities Served

Please select any/all localities your agency serves.

Caroline
Fredericksburg
King George
Spotsylvania
Stafford

Collaborative Impact

Describe in detail how the community would be impacted if your agency were dissolved or merged with another partner agency.

If Rappahannock United Way were to dissolve, the negative impact on the community and the many nonprofits that serve our area would be significant.

A direct consequence to the community would be the loss of RUW direct services such as our Free Tax Preparation program. Currently, no other agency is in the position to assume the responsibilities of the VITA Free Tax program. Were this program to cease, over 2,000 local residents would lose Free Tax Preparation and possibly lose the refunds and credits to which they are entitled. Tax Preparation fees average \$225 per return. For low income families, this is a significant amount of money - an amount that could prevent them from filing, causing even more financial trouble. Given the changes in our tax code, more and more people are seeking tax expertise when completing their returns, and they simply cannot afford to pay preparers.

Beyond direct services for the citizens of our community, supportive collaboration and cooperation between local nonprofits would be seriously impacted. RUW coordinates the Rappahannock Regional Financial Stability Coalition and participates in several other collaborations in the region. These efforts, along with our efforts to raise and grant funds that tackle issues in a coordinated manner, serve to build capacity of local agencies and networks. Loss of this collaboration and support would impact nonprofits and the people they serve.

Community Impact

Please provide at least 2 examples of how your services have impacted members of our community.

Example 1

When Carmen Midence started having car problems and needed to buy a new vehicle, the money she had been saving came in handy.

“This money in savings is helping to buy a new car,” said Midence, explaining that her husband was pleasantly surprised at how much she had been able to save. “It’s good. It makes me feel happy.” How did she do it?

Last year Midence began attending a Financial Life Skills class funded by Rappahannock United Way. After filling out a budgeting worksheet, she decided to make some changes to reduce her family’s household expenses.

“I was paying \$50 for the phone, but now I pay \$20,” said Midence, who found ways to cut monthly bills during her class held at Stafford Junction. “I save money using coupons and I buy for two weeks, not every week, so I don’t buy extra I don’t need.”

For students like Midence, getting in the habit of putting money aside is key.

“Always pay yourself,” said Jose Torres, of Wells Fargo, after co-teaching a session on budgeting to Midence and a group of other women. “Anytime you get paid, transfer money into a savings account. Even if it’s five dollars, eventually you will see results.”

Wells Fargo Personal Banker Andres Mercado encouraged the class to think about where they want to be

financially a year from now and then in five years.

“Saving a little bit is better than saving nothing,” said Andres, who said some people in the class had never thought about writing down their expenses and appreciated the budgeting worksheet that broke their spending into categories. “You can see on paper where you can trim the fat. It’s an eye opener.”

Midence was thankful for the opportunity to attend the free financial classes with a group of her peers.

“I am very grateful for this program because it helps you grow,” said Midence, who is able to attend the classes while her 3-year-old son plays in an adjacent room. “I don’t know where else I can find a place like this. I love it.”

Example 2

Karen Smith* found out about RUW’s free Financial Check-Ups when visiting one of our free Tax Preparation Sites earlier this year. Ms Smith worked full time but had been turned down for promotion at her job because she could not secure the necessary security clearance required. She found out that this was due to her having a bad credit history. Ms Smith did not really understand what this meant or how to go about fixing it. When she saw the information at one of our Tax Sites about Free Financial Check-Ups she jumped at the chance to make an appointment. She met with the RUW Financial Coach and explained her situation. The Financial Coach was able to access Ms Smith’s credit reports online right there and then. They spent some time reviewing it together and Ms Smith realized there were some items on there that actually belonged to an old roommate not her and they were having a negative impact on her credit score. The Financial Coach explained how she could dispute the items with the credit companies and even gave her a copy of a template letter to send them.

Using this information Ms Smith was able to remove the incorrect items from her credit history, restore her credit score and then ultimately achieve the security clearance she needed. A few months later we were delighted to hear from Ms Smith that she now has a new job and a significant pay increase!

*Name changed at client's request.

Example 3 (Optional)

Rappahannock United Way

Agency Budget Narrative

Administrative Expenses

Provide an overview of the administrative costs for your agency.

Rappahannock United Way does not use locality funds for administrative costs.

If your agency is requesting an increase or decrease in administrative funding, please describe in detail the reasons for these changes.

N/A

Please provide justification for and specific amounts of administrative costs that are defrayed by locality funds.

N/A

Capital Expenses

Please provide an overview of the capital costs for your agency.

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

Please provide justification for and specific amounts of capital costs that are defrayed by locality funds.

N/A

Salary & Benefit Expenses

Please provide an overview of any increases or decreases in general personnel expenses for your agency.

Rappahannock United Way does not project any significant increases or decreases in general personnel expenses for FY2020.

Please provide a description of any changes to agency benefits structure or cost.

N/A

Budget Issues

Provide any legislative initiatives or issues that may impact the agency for the upcoming year.

There are no legislative initiatives or issues that Rappahannock United Way is aware of that may impact the agency for this upcoming year.

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.

We are not aware of any outside funding sources that will expire or be reduced.

Please detail any identified agency needs or areas of concern that are currently not being addressed in your funding request.

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.

Rappahannock United Way

Agency Total Budget

In the boxes below provide an overview of the administrative costs associated with your total agency budget.

Expenses

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Salary	631,055.68	739,322.00	673,675.00	745,025.36	745,025.36
Benefits	107,203.78	135,380.00	123,646.00	151,514.58	151,514.58
Operating Expenses	972,599.95	881,040.00	1,052,538.00	838,523.06	838,523.06
Capital Expenses	48,453.07	47,000.00	46,709.00	47,000.00	47,000.00
Other Expenses	152,136.61	198,702.00	200,369.00	155,025.00	155,025.00
Total	1,911,449.09	2,001,444.00	2,096,937.00	1,937,088.00	1,937,088.00

Revenues

Please include revenue associated with your entire organization. This section represents the TOTAL revenue your organization is receiving. The revenue associated with specific programs will be listed within your program budgets; this section represents total revenues. (For example if your organization requests funding for multiple programs the total amount requested from each locality or other entities goes within this section)

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Caroline					
Fredericksburg	3,000.00	3,000.00	3,000.00	3,000.00	3,000.00
King George					
Spotsylvania	4,000.00	0.00		3,000.00	3,000.00
Stafford	2,737.00	2,737.00	2,737.00	2,600.00	2,737.00
United Way					
Grants	93,700.25	81,120.00	86,353.00	83,519.00	83,519.00
Client Fees	118,920.45	41,000.00	50,603.00	41,000.00	41,000.00
Fundraising	1,597,481.84	1,570,605.00	1,693,093.00	1,703,137.00	1,703,000.00
Other (Click to itemize)	91,609.55	302,982.00	261,151.00	100,832.00	100,832.00

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Total	1,911,449.0 9	2,001,444.0 0	2,096,937.00	1,937,088.00	1,937,088.00

Surplus / Deficit

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Surplus or Deficit	0.00	0.00	0.00	0.00	0.00

Rappahannock United Way

Locality Information

Locality Notes

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

Caroline County

10% of individuals served by RUW services and funded programs are allocated to Caroline County residents.

Tax Preparation services are offered at the Caroline YMCA. At all sites, 127 returns were prepared for Caroline residents for tax year 2017.

Caroline Day of Action volunteer projects included Gracie's Gowns and Caroline Habitat for Humanity.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$50,000 worth of assistance to 394 households with a total of 1281 members.

286 individuals from Caroline accessed 211 for information and referral services.

City of Fredericksburg

12% of individuals served by RUW services and funded programs are allocated to Fredericksburg residents.

Tax Preparation services are offered at Headquarters Library. At all sites, 329 returns were prepared for Fredericksburg residents for tax year 2017.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$91,000 worth of assistance to 464 households with a total of 1412 members.

812 individuals from Fredericksburg accessed 211 for information and referral services.

King George County

7% of individuals served by RUW services and funded programs are allocated to King George County residents.

Tax Preparation services are offered at 2 King George sites. At all sites, 160 returns were prepared for King George residents for tax year 2017.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$105,450 worth of assistance to 740 households with a total of 2143members.

217 individuals from King George accessed 211 for information and referral services.

Spotsylvania County

29% of individuals served by RUW services and funded programs are allocated to Spotsylvania County residents.

Tax Preparation services are offered at RUW, located in Spotsylvania. At all sites, 556 returns were prepared for Spotsylvania residents for tax year 2017. Spotsylvania residents comprised 28% of all tax clients (the highest percentage for PD16). Our primary tax site is located in Spotsylvania, and both days of our BB&T Tax Bus service were held in Spotsylvania.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$229,725 worth of assistance to 1163 households with a total of 4448 members. (the highest number of clients tracked in PD16).

1,176 individuals from Spotsylvania accessed 211 for information and referral services. (Highest number in PD16)

Stafford County

18% of individuals served by RUW services and funded programs are allocated to Stafford County residents.

Tax Preparation services are offered at two Stafford Libraries. 459 returns were prepared for Caroline residents for tax year 2017. This represents 23% of all tax returns.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$128,962 worth of assistance to 1025 households with a total of 3409 members.

1,145 individuals from Stafford accessed 211 for information and referral services.

Rappahannock United Way - Volunteer Services

Program Overview

You may save your work at any time by clicking on the "Save My Work" link/icon at the bottom or top of the page.

When you have completed all questions on the form, select the "Save My Work and Mark as Completed" link/icon at the bottom or top of this page.

You may also SWITCH between forms in this application by using the SWITCH FORMS feature in the upper right corner. When switching forms, any updates to the existing form will automatically be saved.

General Information

Program Name Volunteer Services

Is this a new program? No

Program Contact

Name Kathryn Palmer

Title Community Impact Senior Manager

Email kpalmer@rappahannockunitedway.org

Phone (540) 373-0041 x316

Program Purpose / Description

Provide an overview of this program

RUW promotes volunteer engagement as a means of fostering increased citizen involvement in the community and as a way to build capacity of local nonprofits. 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. 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.

RUW organizes volunteer events, projects and training and also maintains and supports RUWVolunteer.org, the area's only free, online database for volunteer matching and management.

Client Fees

Please describe the fees clients must pay for the services by this program.

All services are free.

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.

Individuals and businesses throughout Planning District 16 are ready and willing to donate their time and expertise to assist nonprofit agencies but don't always know where to find volunteer opportunities or how to learn about the types of needs in our community. Without volunteers, many of our local agencies would not be able to provide the essential services that our community relies upon. However, volunteer recruitment and management takes resources - often more resources than small, local agencies possess. By pooling local volunteers' needs in an online database, and by providing training designed to engage volunteers, RUW increases both the number and quality of volunteers available and the number and quality of volunteer opportunities in our area. This investment of time and talent has elevated the services available in our area and increased the capacity of local nonprofits.

If this is a new program, be sure to include the benefits to the region for funding a new request.

N/A

Target Audience and Service Delivery

Describe the program's intended audience or client base and how those clients are served.

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

If your program has specific entry or application criteria, please describe it here.

N/A

Rappahannock United Way - Volunteer Services

Program Budget Narrative

Please indicate in detail reasons for increases or decreases in the amounts you are requesting.

This is a level funding request.

If an increase is being requested, please describe the impact not receiving an increase would have on the program.

N/A

In particular, please describe in detail if any increase is sought for new positions or personnel.

N/A

Rappahannock United Way - Volunteer Services

Program Specific Budget

Please provide your program specific budget below.

Expenses

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Personnel	33,988.14	37,877.51	36,266.20	53,395.19	53,395.19
Benefits	4,332.81	5,742.00	7,971.25	11,695.62	11,695.62
Operating Expenses	26,993.53	38,327.75	30,270.93	24,200.00	24,200.00
Capital Expenses					
Total	65,314.48	81,947.26	74,508.38	89,290.81	89,290.81

Revenues

This section represents revenue specifically associated with your program. Revenue that supports the implementation of your program and the services provided to the community.

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Caroline					
Fredericksburg	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
King George					
Spotsylvania	1,000.00				
Stafford	912.00	912.00	866.67	912.00	912.00
United Way					
Grants	5,000.67	3,000.00	2,099.33	5,262.58	5,262.58
Client Fees					
Fundraising	57,401.81	73,535.26	70,542.38	82,116.23	82,116.23
Other (Click to itemize)	0.00	3,500.00	0.00	0.00	0.00
Total	65,314.48	81,947.26	74,508.38	89,290.81	89,290.81

Surplus / Deficit

	FY 2017 Actual	FY 2018 Budgeted	FY 2018 Actual	FY 2019 Budgeted	FY 2020
Surplus or Deficit	0.00	0.00	0.00	0.00	0.00

Rappahannock United Way - Volunteer Services

[View Diagram](#) Goals and Objectives

Goals

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

Objectives

		2017 Baseline	2017 Year End	2018 Baseline	2019 Baseline
To increase the number / percentage of RUWVolunteer.org active users who respond to episodic or one-time volunteer events with local nonprofit organizations.	Total # Clients Served	465	1,183	500	1,000
	Total # Clients Achieved/Successful	350	1,183	500	1,000
	% Achieved / Successful	75.27	100	100	100
To ensure volunteers have a positive and rewarding experience when engaged in volunteering. 85% or better satisfaction rate on follow up surveys. 95% of surveyed volunteers report a positive experience when engaged in volunteering.	Total # Clients Served		124	130	100
	Total # Clients Achieved/Successful		124	130	100
	% Achieved / Successful		100	100	100

Explanation & Overview

If your outcomes are significantly less than your stated objectives, please note any reasons why this might be the case

Updates for FY2018

Please note any changes you plan to make to the program, or the stated goals and objectives, given the data you have reported

RUW is adding volunteer opportunities that benefit multiple agencies through our new Seasons of Service options. For example, we have worked with local companies, civic groups and even neighborhoods to hold supply drives (books, diapers, meal kits) and hosted sorting events. The items collected are distributed to several local nonprofits. This improves efficiency by organizing multiple drives under one effort.

If you are restating the goals or objectives for the prior calendar year, please include those here

Goal:

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

		2017 Baseline	2017 Year End	2018 Baseline	2019 Baseline
More nonprofit agencies will create and maintain RUWVolunteer.org accounts to share volunteer and in-kind donation needs. For this measurement client = agency.	Total # Clients Served		152	145	155
	Total # Clients Achieved/Successful		152	145	155
	% Achieved / Successful		100	100	100
Nonprofit agencies, local schools and faith based organizations will utilize the Volunteer Website to better recruit and manage volunteers as demonstrated through an increase in the number of registered active needs on Volunteer Website. NOTE: For this objective "Clients" in the objective results table refers to number of needs posted.	Total # Clients Served	65	70	65	70
	Total # Clients Achieved/Successful	65	70	65	70
	% Achieved / Successful	100	100	100	100

Explanation & Overview

If your outcomes are significantly less than your stated objectives, please note any reasons why this might be the case

N/A

Updates for FY2018

Please note any changes you plan to make to the program, or the stated goals and objectives, given the data you have reported

N/A

If you are restating the goals or objectives for the prior calendar year, please include those here

N/A

Rappahannock United Way - Volunteer Services

Number of Individuals Served

Localities

Please provide the actual numbers of individuals served in this program during FY2017 and FY2018, the estimated numbers of individuals served in FY2019 and the projected numbers of individuals served in FY2020.

Locality	FY2017 (Actual)	FY2018 (Actual)	FY 2019 Estimate	FY 2020 Projected
Fredericksburg City	589	550	595	595
Caroline County	50	47	50	50
King George County	61	59	65	65
Spotsylvania County	742	692	750	750
Stafford County	372	364	380	380
Other Localities	236	231	233	233
Total	2,050	1,943	2,073	2,073

Rappahannock United Way - Volunteer Services

Collaborative Impact

Efforts and Partnerships

Describe in detail examples of collaborative efforts and key partnerships between your program and the other programs or agencies in the area.

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. Nonprofits can also use this site to manage volunteer assignments and confirm hours.

There are currently over 120 local nonprofit organizations using the volunteer website to promote hundreds of volunteer events and opportunities. Over 1,100 connections were made between nonprofit agencies and potential volunteers.

Without this central online hub of volunteer opportunities, individuals seeking to engage with their community would have to search an overwhelming number of individual websites for local nonprofits and could miss opportunities that would be an ideal match for their interests and skills. By utilizing one central hub, smaller and lesser known nonprofits can showcase their work and engage new supporters and volunteers.

Collaborative Impact

Describe in detail how the community would be impacted if your program were dissolved or merged with another partner agency.

Rappahannock United Way has provided the only region-wide, volunteer center services to the nonprofit community for the past 23 years at no cost. 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 and coordination 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.