

## Regional Funding

### Fiscal Year 2019 - Partner Funding Application

#### Rappahannock United Way

#### Agency Information

##### General Information

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

##### Agency Mission Statement

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

<b>Number of Years in Operation</b>	78
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##### Main Contact

<b>Main Contact</b>	Sarah Walsh, phone: (540) 373-0041 x315, email: <a href="mailto:swalsh@rappahannockunitedway.org">swalsh@rappahannockunitedway.org</a>
<b>Job Title</b>	Vice President - Community Impact

##### Localities Served

*Please select any/all localities your agency serves.*

<b>Caroline</b>	<input checked="" type="checkbox"/>
<b>Fredericksburg</b>	<input checked="" type="checkbox"/>
<b>King George</b>	<input checked="" type="checkbox"/>
<b>Spotsylvania</b>	<input checked="" type="checkbox"/>
<b>Stafford</b>	<input checked="" type="checkbox"/>

##### Collaborative Impact

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

The dissolution of Rappahannock United Way would have a significant negative impact on the community and the many nonprofits that serve our area.

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.

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**

Koren C. turned to Rappahannock United Way's Free Tax Preparation Program this year, visiting the Spotsylvania tax prep site on a Saturday in February. "Being I'm a single mom, I couldn't afford to go to another tax preparation service. They take a good amount of money out."

Koren has also tried filing her own taxes. When she ended up owing she decided she didn't want to take that route again. After arriving at Rappahannock United Way, not only did she get free full-service tax preparation from an IRS-certified volunteer, but she also received some free financial coaching and advice about how to get the highest credit score possible.

"This service means a lot," said Cole, who works full time, has a five year old son in Head Start and was happy to learn she was getting a refund this year, which will help with bills and other expenses. "The more money I can get back is great because it goes to my son. He's a growing boy and he likes to eat. So it definitely helps with the groceries."

### **Example 2**

Rappahannock United Way serves as a crucial resource in our community around Volunteerism. Through our programs, events, and volunteer matching services we provide meaningful volunteer opportunities to local residents and a chance to build skills and support the tremendous work being done by local nonprofits. Our Day of Action connected nearly 300 volunteers with local projects totaling \$40,000 in free labor! Projects that were completed were a blessing to the nonprofits who participated and a crucial opportunity for businesses to invest in their community.

Our most significant volunteer program is our VITA Tax Prep program. Volunteers in this program receive free training and IRS certification, and this opportunity is often a skill-builder that helps them prepare for

the future.

For several weeks this tax season, high school junior Brian Kersellius headed straight to Porter Library after school to volunteer as a tax greeter.

“This is my first volunteer experience,” said Kersellius, “I was kind of unsure at first, then when I got used to it, I realized it wasn’t as hard as it seemed.”

Kersellius, who said volunteering is a requirement for his high school International Baccalaureate program, went through 4 hours of training at Rappahannock United Way and had to pass two short online tests to become IRS certified for the volunteer tax greeter position. Kersellius hit the ground running and screened a roomful of clients each day he volunteered.

Dealing with the public on this level was a new experience for Kersellius and he’s happy he had the opportunity.

“I learned a lot more about taxes and the process in general,” said Kersellius. “I’ve never really dealt with people on this level before. It’s definitely increased my interpersonal skills. It’s opened my mind. I realized there are so many people out there struggling financially and it’s great to have a program like this that can at least help them a little bit.”

### **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.

Our current Admin/Fundraising Ratio is 16%.

**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 FY2019.

**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

	<b>FY 2017 Actual</b>	<b>FY 2018 Budgeted</b>	<b>FY 2019</b>
Salary	631,055.68	739,322.00	739,322.00
Benefits	107,203.78	135,380.00	135,380.00
Operating Expenses	972,599.95	881,040.00	884,040.00
Capital Expenses	48,453.07	47,000.00	47,000.00
Other Expenses	152,136.61	198,702.00	198,702.00
Total	1,911,449.09	2,001,444.00	2,004,444.00

#### 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)*

	<b>FY 2017 Actual</b>	<b>FY 2018 Budgeted</b>	<b>FY 2019</b>
Caroline			
Fredericksburg	3,000.00	3,000.00	3,000.00
King George			
Spotsylvania	4,000.00	0.00	3,000.00
Stafford	2,737.00	2,737.00	2,737.00
United Way			
Grants	93,700.25	81,120.00	81,120.00
Client Fees	118,920.45	41,000.00	41,000.00
Fundraising	1,597,481.84	1,570,605.00	1,570,605.00
Other (Click to itemize)	91,609.55	302,982.00	302,982.00
Total	1,911,449.09	2,001,444.00	2,004,444.00

#### Surplus / Deficit

	<b>FY 2017 Actual</b>	<b>FY 2018 Budgeted</b>	<b>FY 2019</b>
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Surplus or Deficit	0.00	0.00	0.00
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## **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, 160 returns were prepared for Caroline residents for tax year 2016.

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 \$66,000 worth of assistance to 400 households with a total of 1287 members.

269 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, 330 returns were prepared for Fredericksburg residents for tax year 2016.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$59,000 worth of assistance to 424 households with a total of 1388 members.

675 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, 125 returns were prepared for King George residents for tax year 2016.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$147,000 worth of assistance to 757 households with a total of 2257 members.

190 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, 716 returns were prepared for Spotsylvania residents for tax year 2016. Spotsylvania residents comprised 34% of all tax clients (the highest percentage for PD16)

Using Charity Tracker, local nonprofits and DSS staff tracked over \$170,600 worth of assistance to 1268 households with a total of 4891 members. (the highest number of clients tracked in PD16).

1,104 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. 476 returns were prepared for Caroline residents for tax year 2016.

Using Charity Tracker, local nonprofits and DSS staff tracked over \$118,000 worth of assistance to 1005 households with a total of 3231 members.

1086 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** Katerina Vollten

**Title** Financial Stability Manager

**Email** kvollten@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.

## **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.**

Up to 12.6% of families in our area, 10% of whom have children, are living at or below the poverty line. 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.

RUW works to help people in our region claim their credits and refunds, empower taxpayers to learn to file their own taxes, ensure that filers are not spending money unnecessarily on tax preparation fees, and encourage low- and moderate-income working families to adopt financial practices that will help to raise (and keep) them out of poverty. RUW also offers Financial Stability capacity building trainings to empower local agencies to embed Financial Stability services into their existing programs. The RUW-led Rappahannock Regional Financial Stability Coalition is currently the only program providing free tax prep and financial education services to low- and moderate-income families in this region.

**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.

Those with barriers to access - individuals with disabilities, English as a second language, refugee status, and senior citizens are also targeted through specific accommodations and outreach.

**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 with the exception of funding from Spotsylvania County. In Spotsylvania we request a restoration of funds and a shift of those funds to support the Free Tax Preparation and Financial Coaching program.

The funding requested is less than 1% of the total agency operating costs. Rappahannock United Way has kept our funding request level. RUW is seeking restoration of funding from King George so that we can continue to support financial stability programs and services located within all Planning District 16 localities.

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

Not receiving the restoration in funds from Spotsylvania will impact our ability to secure funding from other sources. We must have local match funds in order to draw down federal dollars. Currently we are serving Spotsylvania county but do not meet the requirement that we receive support from the county. Not receiving the funds could also result in a reduced capacity to serve individuals at Spotsylvania locations.

In King George, not receiving funds would jeopardize our ability to offer two quality tax sites located within the county (Smoot Library and the Community Center). These locations are essential to King George Residents, and are much more convenient than our site located in Spotsylvania/Fredericksburg.

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

N/A

# Rappahannock United Way - Free Tax Preparation and Financial Coaching

## Program Specific Budget

Please provide your program specific budget below.

### Expenses

	<b>FY 2017 Actual</b>	<b>FY 2018 Budgeted</b>	<b>FY 2019</b>
Personnel	73,283.98	76,039.68	76,039.68
Benefits	7,667.22	13,042.96	13,042.96
Operating Expenses	52,635.21	60,288.96	63,288.96
Capital Expenses			
Total	133,586.41	149,371.60	152,371.60

### 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.

	<b>FY 2017 Actual</b>	<b>FY 2018 Budgeted</b>	<b>FY 2019</b>
Caroline			
Fredericksburg	1,000.00	1,000.00	1,000.00
King George			
Spotsylvania	1,000.00	0.00	3,000.00
Stafford	913.00	913.00	913.00
United Way			
Grants	64,399.91	53,787.00	53,787.00
Client Fees			
Fundraising	66,273.50	93,671.60	93,671.60
Other (Click to itemize)	0.00	0.00	0.00
Total	133,586.41	149,371.60	152,371.60

### Surplus / Deficit

	<b>FY 2016 Actual</b>	<b>FY 2017 Budgeted</b>	<b>FY 2018 Requested</b>
Surplus or Deficit	0.00	0.00	0.00

[View Diagram](#) Goals and Objectives

**Goals**

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

Objectives	Objective Results	Year End	Baseline
<b>Individuals who qualify will utilize free tax preparation and filing services, saving an average of \$225 per household in preparation fees.</b>	Total # Clients Served	1,989	2,000
	Total # Clients Achieved/Successful	1,989	2,000
	% Achieved / Successful	100	100
<b>Clients will pledge at least 10% of their tax credit/refund to savings accounts or paying down debt.</b>	Total # Clients Served	560	560
	Total # Clients Achieved/Successful	47	70
	% Achieved / Successful	8.39	12.50

**Outcomes Narratives**

**Explanation & Overview**

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

The RUW Tax program has consistently reached its goals and objectives and exceeded outputs in recent years. The number of clients who deposited all or part of their refund into savings dropped slightly this year, but clients still consistently report that their refunds will be used to pay off debt.

**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 continues to build the capacity of the Free Tax Prep program with investments of staff and other resources. Each year, we increase our goals for number of clients served, number of clients who self-file and file with tax coach assistance, and number of clients who access free financial coaching opportunities.

**If you are restating the goals or objectives for FY 2018, please include those here**

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

<b>Objectives</b>	<b>Objective Results</b>	<b>Year End</b>	<b>Baseline</b>
<b>Individuals will complete self tax preparation and filing using RUW Coached sites or free online software.</b>	Total # Clients Served	1,989	2,080
	Total # Clients Achieved/Successful	466	550
	% Achieved / Successful	23.43	26.44
<b>Individuals will participate in free financial coaching.</b>	Total # Clients Served	1,523	1,400
	Total # Clients Achieved/Successful	700	750
	% Achieved / Successful	45.96	53.57
<b>Clients access and review Credit Reports</b>	Total # Clients Served	82	100
	Total # Clients Achieved/Successful	2	25
	% Achieved / Successful	2.44	25

## **Outcomes Narratives**

### **Explanation & Overview**

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

RUW has consistently achieved and usually exceeded tax program goals. We continue to focus resources on financial coaching in order to be able to offer more coaching options to tax clients.

The number of credit reports pulled was lower than expected but reflects the actual need for credit reports during in-depth financial counseling sessions. Several clients pulled their report on their own after learning how to do so during counseling.

### **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 plan to continue to grow the capacity to provide free tax preparation assistance as well as financial coaching opportunities both within RUW programs and with the agencies participating in the Rappahannock Regional Financial Stability Coalition.

**If you are restating the goals or objectives for FY 2018, please include those here**

## 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 FY2016 and the projected numbers of individuals to be served in FY2018.*

<b>Locality</b>	<b>FY2017 (Actual)</b>	<b>FY2019 (Projected)</b>
Fredericksburg City	315	330
Caroline County	155	160
King George County	120	125
Spotsylvania County	686	716
Stafford County	470	476
Other Localities	243	273
Total	1,989	2,080

## **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. Coalition 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 Act 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, and 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. We are uniquely positioned to bring organizations together. 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 the Coalition's efforts to expand financial coaching and financial stability resources would be halted. 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.

## 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** Jessica Walthall

**Title** Volunteer Coordinator

**Email** kpalmer@rappahannockunitedway.org

**Phone** (540) 373-0041 x314

### 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.**

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.**

Individuals and organizations throughout Planning District 16 are ready and willing to donate their time and expertise to assist the nonprofit agencies in their community, and without volunteers, many of our local agencies would not be able to provide the essential services that our community needs. However, volunteer recruitment and management takes resources - often more resources that agencies possess. By pooling local volunteers needs in an online database, and by providing training and events 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.**

The funding amount requested is under 1% of the total agency operating costs. Rappahannock United Way has continued to receive funding support from Fredericksburg, Spotsylvania and Stafford localities, and has kept our funding request level.

**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

	<b>FY 2017 Actual</b>	<b>FY 2018 Budgeted</b>	<b>FY 2019</b>
Personnel	33,988.14	37,877.51	37,877.51
Benefits	4,332.81	5,742.00	5,742.00
Operating Expenses	26,993.53	38,327.75	38,327.75
Capital Expenses			
Total	65,314.48	81,947.26	81,947.26

#### 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.

	<b>FY 2017 Actual</b>	<b>FY 2018 Budgeted</b>	<b>FY 2019</b>
Caroline			
Fredericksburg	1,000.00	1,000.00	1,000.00
King George			
Spotsylvania	1,000.00		
Stafford	912.00	912.00	912.00
United Way			
Grants	5,000.67	3,000.00	3,000.00
Client Fees			
Fundraising	57,401.81	73,535.26	73,535.26
Other (Click to itemize)	0.00	3,500.00	3,500.00
Total	65,314.48	81,947.26	81,947.26

#### Surplus / Deficit

	<b>FY 2016 Actual</b>	<b>FY 2017 Budgeted</b>	<b>FY 2018 Requested</b>
Surplus or Deficit	0.00	0.00	0.00

[View Diagram](#) Goals and Objectives

**Goals**

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

Objectives	Objective Results	Year End	Baseline
<b>To increase the number / percentage of RUWV.org active users who respond to episodic or one-time volunteer events with local nonprofit organizations.</b>	Total # Clients Served	465	500
	Total # Clients Achieved/Successful	651	500
	% Achieved / Successful	140	100
<b>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.</b>	Total # Clients Served	121	130
	Total # Clients Achieved/Successful	112	130
	% Achieved / Successful	92.56	100

**Outcomes Narratives**

**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**

No changes.

**If you are restating the goals or objectives for FY 2018, 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	Objective Results	Year End	Baseline
<b>More nonprofit agencies will create and maintain RUWVolunteer.org accounts to share volunteer and in-kind donation needs. For this measurement client = agency.</b>	Total # Clients Served	142	145
	Total # Clients Achieved/Successful	142	145
	% Achieved / Successful	100	100
<b>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.</b>	Total # Clients Served	59	65
	Total # Clients Achieved/Successful	58	65
	% Achieved / Successful	98.31	100

## Outcomes Narratives

### 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

No changes

If you are restating the goals or objectives for FY 2018, please include those here

## Rappahannock United Way - Volunteer Services

### Number of Individuals Served

#### Localities

*Please provide the actual numbers of individuals served in this program during FY2016 and the projected numbers of individuals to be served in FY2018.*

<b>Locality</b>	<b>FY2017 (Actual)</b>	<b>FY2019 (Projected)</b>
Fredericksburg City	589	595
Caroline County	50	50
King George County	61	65
Spotsylvania County	742	750
Stafford County	372	380
Other Localities	236	235
Total	2,050	2,075

## **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 actively using the volunteer website to promote hundreds of volunteer events and opportunities. Nearly 1,200 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.

## 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 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 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.**

People in crisis often have a difficult time locating the resources they need. 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 our Listserv, and by producing online and printed copies of the Quick Guide. By serving as an information access point, RUW increases efficient access to information.

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. Unfortunately, many people in our community are still not aware of this incredible resource. Information Services works year round to raise awareness of 2-1-1. Over 4,330 individuals used 2-1-1 last year.

The local RUW Charity Tracker Network makes it easier for agencies to help local residents by providing an easy way to share information and services.

**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.**

The funding amount requested is under 1% of the total agency operating costs. Rappahannock United Way has continued to receive funding support from Fredericksburg and Stafford localities, and has kept our funding request level.

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

No increase is being requested.

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

## Rappahannock United Way - Information Services

### Program Specific Budget

Please provide your program specific budget below.

#### Expenses

	<b>FY 2017 Actual</b>	<b>FY 2018 Budgeted</b>	<b>FY 2019</b>
Personnel	9,103.01	8,796.37	8,796.37
Benefits	977.31	1,628.44	1,628.44
Operating Expenses	10,089.78	10,050.07	10,050.07
Capital Expenses			
Total	20,170.10	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.

	<b>FY 2017 Actual</b>	<b>FY 2018 Budgeted</b>	<b>FY 2019</b>
Caroline			
Fredericksburg	1,000.00	1,000.00	1,000.00
King George			
Spotsylvania	2,000.00		
Stafford	912.00	912.00	912.00
United Way			
Grants	14,299.67	3,000.00	3,000.00
Client Fees			
Fundraising	1,958.43	15,562.88	15,562.88
Other (Click to itemize)	0.00	0.00	0.00
Total	20,170.10	20,474.88	20,474.88

#### Surplus / Deficit

	<b>FY 2016 Actual</b>	<b>FY 2017 Budgeted</b>	<b>FY 2018 Requested</b>
Surplus or Deficit	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	Objective Results	Year End	Baseline
<b>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.</b>	Total # Clients Served	3,935	3,400
	Total # Clients Achieved/Successful	3,324	3,400
	% Achieved / Successful	84.47	100
<b>The number of individuals educated about 2-1-1 and other community resources through outreach activities will increase over last year.</b>	Total # Clients Served	2,000	2,200
	Total # Clients Achieved/Successful	2,457	2,200
	% Achieved / Successful	122.85	100

**Outcomes Narratives**

**Explanation & Overview**

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

RUW has seen a decline in number of callers to 2-1-1 as more people use their redesigned web search feature. Search data for the 2-1-1 website is not available, but we are now able to track the number of visits to our 2-1-1 and Quick Guide. Last year, 218 individuals accessed our 211 page and Quick Guide.

**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**

No new changes are planned.

**If you are restating the goals or objectives for FY 2018, 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.**

<b>Objectives</b>	<b>Objective Results</b>	<b>Year End</b>	<b>Baseline</b>
<b>Increase the number of individuals, service providers, churches, schools and businesses that are educated about resources by 10% over last year.</b>	Total # Clients Served	2,000	2,734
	Total # Clients Achieved/Successful	2,494	2,734
	% Achieved / Successful	124.70	100
<b>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.</b>	Total # Clients Served	108	108
	Total # Clients Achieved/Successful	107	108
	% Achieved / Successful	99.07	100

## **Outcomes Narratives**

### **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**

No new changes are planned.

**If you are restating the goals or objectives for FY 2018, 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 FY2016 and the projected numbers of individuals to be served in FY2018.*

<b>Locality</b>	<b>FY2017 (Actual)</b>	<b>FY2019 (Projected)</b>
Fredericksburg City	1,322	1,325
Caroline County	794	800
King George County	1,007	1,015
Spotsylvania County	2,419	2,430
Stafford County	2,116	2,130
Other Localities		
Total	7,658	7,700

## **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 8 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.