



## Narratives

### Executive Summary

RSVP Grant Executive Summary:

The mission of the United Way of Escambia County is to create opportunities for a better life by uniting and mobilizing resources. Started in 1924 as a community chest that funded all the operating expenses for local non-profits, we have evolved into an organization that is intent on mobilizing the resources and individuals in an effort to positively improve lives and the fabric of our community. We are the linkage between individuals and the community they need and love.

Seven local citizens started the Community Chest of Escambia County in 1924. Except for a brief closure during Depression years, this community service has operated uninterrupted into the 21st century, becoming the United Fund in 1957, and United Way of Escambia County in 1972. We have a long history and proven track record of sustainable and meaningful support of our community.

Over the decades, the local campaign has partnered with other charitable entities. In 1943, still known as the Community Chest, the United Way partnered with the War Fund Drive, creating the first link between the local organization and federal employees. Today, a structured campaign works cooperatively with corporate workplaces, school district employees and the Combined Federal Campaign locally.

The United Way of Escambia County continues to expand its service to our community. We currently have a 32 person volunteer board of directors, and an 18 person staff that run an annual giving campaign, a resource and referral call center known as 2-1-1, a volunteer program, an annual voluntary income tax assistance program, annual school supply and holiday supply drives and a very trusted funds allocation process. Once thought of as strictly a fundraising organization, the United

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Way of Escambia County is now a trusted leader of change that mobilizes community resources to improve lives. We provide highly evaluated and measured impacts and investments of funds and volunteer hours are based on positive outcomes in three core impact areas of health, financial stability and education.

In 2011, we revised our vision to revitalize our focus on engagement. We committed to increasing volunteer engagement in our community by 5% a year in an effort to provide purposeful service opportunities to all Escambia County citizens. We are strongly committed to enabling citizens to create a better community by engaging in volunteer service with area non-profits, schools, and volunteer programs meant to challenge our citizens to create sustainable solutions to our most pressing community needs. The RSVP program enables us to purposefully reach out to area seniors to match them with opportunities to inspire them to passionate service that improves their quality of life.

United Way brings people and organizations together to improve our community by strategically investing time and resources in quality programs. We build strong partnerships, advocate for better policies, engage people in volunteer and non-profit opportunities and leverage resources. We measure success not by dollars raised, but by lives improved and changed. Too often people think of United Way as the ultimate middleman. They see us only as an organization that fundraises in the Fall, but in truth, we work at improving lives by mobilizing the caring power of the community 365 days a year. Our expertise in matching resources with focused impacts performed allows us to make the most positive difference in meeting needs in education, financial stability and health. We take the guesswork out of philanthropy and donors and volunteers who invest in United Way can be confident they will see a positive definable return. Ultimately, we want donors to know that their time, talents and gifts are the most powerful leveraged contribution they could ever make.

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In 2012, we leveraged the generous contributions of 1,799 volunteers who donated close to 30,000 hours to make our community stronger. This volunteer labor represented a \$629,000 gift of talent and service that was matched to opportunities at area non-profit agencies, schools and in response to specific community needs.

We believe that with the power of the United Way brand, we can expand this impact to positively impact more people within our community by leveraging the passion, talents, and time of Escambia County seniors. With 65 partner non-profit agencies, 275 partner workplaces and a strong community presence, we can dramatically improve the quality of life experienced by senior citizens engaged in purposeful service to our community. Because of our organization's diverse reach, we are uniquely qualified to match seniors with rewarding service activities with a focuses on economic opportunity and our VITA program; with healthy food activities that include matching seniors with food delivery through Council on Aging Meals on Wheels and Congregate Meal Site Programs and staffing the Manna and Bay Area Food Bank pantries; strong partnerships with disaster service focus include available opportunity to staff our 2-1-1 call centers during time of disaster, assist American Red Cross and BRACE in shelters, meal distribution, fire recovery and natural disaster recovery; education based activities will include tutoring and mentoring activities coordinated in conjunction with Head Start, Early Learning Coalition of Northwest Florida, Learn to Read of Northwest Florida, Every Child a Reader (ECARE) and Big Brothers Big Sisters. Across all focus areas, seniors will be able to volunteer as call and referral specialists for our 2-1-1 program and will make referrals for a diverse array of health and human service programs.

It is vitally important that this RSVP program be funded this year as our community struggles to

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recover from a recession compounded by the BP Oil Spill. Escambia County, like many counties in Florida, is filled with generous and passionate individuals who want to help those who they perceive to be less fortunate. The difference from many other counties is that the number of less fortunate outpaces surrounding areas. According to the 2010 census, 16.4% of the Escambia County population lives below the poverty line; a shocking 2.6% below the Florida poverty line. While Florida, has grown 17.6% in the last 10 years, Escambia County only had 1.1% growth. Consequently, our non-profit and community partners must efficiently and effectively coordinate resources to best meet needs without duplicating services. They need volunteers to assist them!

We have 295 readily identifiable non-profits in our area who work to address various social and human service needs. Some are uniquely qualified to render service in an efficient and effective manner. Many are sustained by the compassion and energy of dedicated leaders who have varying degrees of business and non-profit acumen. While their service and commitment is admirable, it is not enough without volunteers to bolster their resources and to inspire others.

A dramatic increase in applications from agencies and programs that need funding to meet their core missions of service in the community means the need is growing and it is imperative that agencies are equipped and staffed to maximize the funding we provide.

Applications grid: a sure indicator of growing need and declining resources

2011-12 2012-13 change from last year

#Programs applied 43 53 10, 23%

# Agencies applied 31 41 10, 32%

# New Programs ap. 7 16 9, 129%

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# agencies new ap. 4 10 6, 150%

Simply put, if we are going to meet growing community needs outlined in program applications received year-after-year, we must effectively train and recruit volunteers to bolster the staffing at area non-profits. Seniors looking for opportunities to engage in the community and to be placed in meaningful service to others provide the perfect match for this need.

### Strengthening Communities

Escambia County ranks among Florida's top 5 based on community size & poverty (2010 Census=16.4% live below poverty). While blessed with the beauty and history of the Florida Panhandle, we face overwhelming poverty, natural and man-made disasters, a depressed housing market and an aging population.

The gender divide is negligible (49% male, 51% female). Ethnicity is primarily Caucasian (57%) with 31% African-American, 6% Hispanic, 2% Asian, <1% American Indian and 2% other. Pockets of racial disparity center on blighted city centers and rural areas. According to [www.city-data.com](http://www.city-data.com), the African-American population in Century (56%), Goulding (61%), and Brownsville (72%) is not typical of our County. Unemployment in these areas ranges from 8.2% to the County high of 9%. Conversely, high school graduation rates are at lows of 53%. Our oldest population is in Goulding (44.3 avg).

Our citizens struggle with a recession compounded by a loss of home equity. Average home sale prices declined 31% from \$137,000 in 2007 to \$94,000 in 2012. Financial hardships are forcing families to abandon homes they cannot sell in a market where sales are down by 37% from 4,000 in 2007 to 2,500 in 2012. Seniors with diverse life experience engaged in volunteerism can help provide

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solutions to community problems.

United Way assessments and conversations with non-profits, community leaders, workplace employees and the general population help plan mobilization and engagement to build partnerships that meet community needs. Information gathering and program development for RSVP will occur through direct solicitation, social media, printed materials, and surveying promoted through donated advertising. Processed information is utilized in strategic planning where key priorities and strategies are outlined as a blueprint for how we engage the general community.

Annually, United Way conducts a database survey to determine community impact through measurement of financial, volunteer and in-kind resource mobilization and leveraging. Every three years, we conduct a self-assessment with input from staff, volunteers, agencies, partners, donors and community leaders to evaluate our work utilizing standards of excellence mandated by United Way Worldwide. This ensures we are evaluated by the community and that we implement their viewpoints into program activities.

We bring people together and listen to their views. Monthly board meetings include a community impact and community leader segments that update United Way leadership on non-profit agency needs, trends, key issues and local attempts to actively initiate positive change. Monthly leadership training with loaned executives from partner companies ends with a community feedback session. A bi-monthly gathering of the United Way Agency Directors Association allows us to apprise partner agencies of opportunities while garnering feedback on area needs. All of the above will help design, promote, implement and evaluate the RSVP program. Partnerships with the local newspapers, magazines, radio and television stations will allow us to utilize PSA space to promote RSVP.

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United Way is committed to our mission of creating opportunities for a better life by uniting and mobilizing resources. Everything we do is centered on solving community problems by mobilizing non-profit agencies, governmental and business partners, individual citizens and funders. We work daily to ensure that the needs identified are met by caring individuals and corporate partners who believe that together we can create a better community.

We enhance the capacity of organizations and institutions within our community by matching volunteers, financial and in-kind goods and services with needs. One of United Way's strengths is the ability to unite people from various backgrounds in progress toward a common goal. We work with a diverse array of 65 non-profit agency partners and have successfully rendered our mission since 1924.

### Recruitment and Development

Central to meaningful service is need. Volunteers must understand the need that they are fulfilling! Despite diverse service opportunities our standardized volunteer orientation clearly covers community needs addressed through volunteerism.

A quarterly lunch and learn session for RSVP volunteers would allow agency representatives to update volunteers on their impact on agency clients. For exposure to other community leaders, RSVP volunteers would be invited to attend the community leader segment of our monthly Executive Leadership program.

A volunteer mentor program for RSVP would enable veteran volunteers to match new volunteers with service opportunities while helping develop a healthy volunteer experience. Open discussions on the volunteer experience would occur at the end of quarterly lunch and learn roundtables and bi-

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annual surveys would evaluate service.

While seniors' experience and wisdom makes them especially valuable to non-profits serving those experiencing hardships, some senior volunteers are also vulnerable. Staff will utilize quarterly lunch and learns and bi-annual surveys to determine if senior volunteers have unmet needs. Along with the mentor/volunteer relationship we hope to build upon the esprit de corps to help us enhance the senior volunteer's quality of life.

United Way's reach across the health and human spectrum provides several recruitment avenues for diverse volunteers. While much of what we do is in partnership with agencies, we directly operate the largest one-day volunteer event across our region. Day of Caring typically matches over 1,100 volunteers with over 100 community projects. It is often an incubator for creating positive matches between willing volunteers and community service opportunities. Many volunteers trace their long-standing service at area agencies to Day of Caring. It is a highly effective recruitment tool.

We are actively involved with a myriad of organizations who list their top three volunteer opportunities on our website. We'd promote this site through a marketing campaign to drive senior volunteers to services that match their passion.

Additionally, working seniors and those soon to retire can be recruited from the 275 business partners that conduct annual workplace campaigns with United Way. Agency site visits and presentations inspire the business community we expose to these agency partners. We coordinate wish list drives and linkage to volunteer opportunities between organizations and could work with these business partners to provide RSVP materials to retiring employees who wish to stay engaged in the community.

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Our strategic plan includes a commitment to raising our stature as a resource for the community looking to engage in volunteer service. We maintain over 1,300 agency profiles and serve as a partner for agencies referring clients to 2-1-1: our 24-hour resource and referral service. Integrating senior service into the activities of other service programs within the community is a natural fit for the role we play in the community.

We'd keep seniors engaged by recognizing an RSVP volunteer each quarter at our lunch and learns and in our quarterly newsletter. A RSVP volunteer would be recognized monthly through our eNews and annually at our annual meeting.

Our dedicated staff is committed to engaging volunteers in meaningful experiences. The success of our program is predicated on the belief that volunteers will stay engaged if they are appropriately matched, thanked and trained. Each volunteer fills out an in-depth application and receives a volunteer orientation. Specific training is provided on the program to which they are matched. For partnerships and placements outside the United Way, partnering agencies are required to have appropriate training and protocols in place to ensure full utilization of volunteer service.

### **Program Management**

As part of our organizational commitment to our community, we added a Volunteer/Community Engagement position (VCEM) on our staff in 2011. This position is tasked with ensuring that United Way effectively develops and manages meaningful volunteer opportunities to help meet community needs. Growth, retention and volunteer satisfaction are all benchmarks that are regularly evaluated as part of the program plan. Currently, the VCEM reports monthly on volunteer matches, trends and progress. External and internal matches are distinguished through the reporting. Hours are tracked by

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volunteer then are reported back for measurement of impact on our ability to leverage resources to meet needs in key focus areas of education, health and financial stability.

The VCEM is tasked with recruiting opportunities and partnerships to meet needs at area non-profits. A structured training program educates volunteers on opportunities, expectations and assignments. After assignment or major events volunteers are surveyed to determine the success of the match and opportunity. This information is utilized to improve the volunteer experience and to enhance community impact. Our standard is a minimum of a 90% satisfaction rating and a 5% growth in services/impact for each engagement opportunity.

Last year, 1,799 volunteers engaged in close to 30,000 hours of service with United Way. This represented a donation of the equivalent of over \$629,000 in free labor. A new database program is going to let us capture and report even more as we are able to track volunteer, agency and corporate interests and affiliations as part of the relationship management process. We feel it is our responsibility to report impact to our donor community.

As part of our annual reporting for United Way Worldwide, we have to capture the volunteer opportunities managed in the prior year. We categorize these relationships and experiences based on the nature of the volunteerism. We report out on volunteer hours and efforts related to fundraising, non-profit capacity building, VITA, community impact, mentoring/reading initiatives, disaster response and preparedness, Cram the Van, Emerging Leaders Society, Loaned Executive Leadership, community service and 2-1-1 resource and referral.

As a non-profit we consider it our responsibility to effectively and efficiently manage all our programs.

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We work hard to ensure that we are able to grow financial resources and in-kind goods and resources to the benefit of our community. Last year, we leveraged \$3.5M in financial resources to create \$8.1M in impact on our community. This was only possible because of our collaborative partnerships and our strong volunteer corps. We grew our Day of Caring impact by 22% and had a 25% increase in hours volunteered over the prior year. Overall, our volunteer hours increased by 10%. For the first time, we coordinated partnerships at local agencies and provided 2 months worth of volunteers that resulted in 783 volunteer hours at 5 local agencies for a valued impact of \$16,725. Marketing partnerships increased by 10%, and social media promotions increased by 200% in 2011. We'll utilize these increased resources to effectively promote our program and manage our resources.

As mentioned before, we leverage to stretch limited resources to their full impact. In 2011, we increased the in-kind donations to United Way 200%. We have developed process to recruit and track similar donations again this year, so that we may sustain programs vital to our community.

### **Organizational Capability**

Our expertise with the disadvantaged and disenfranchised in our community is based in our mission and long history of service that started in 1924 when our community chest funded all operating expenses for local non-profits. We have evolved into an organization that mobilizes local resources to positively improve lives and the fabric of our community.

Annually we lead a workplace giving campaign, a 2-1-1 resource and referral call center, VITA program, annual school and holiday supply drives and a very trusted funds allocation process. Once thought of as strictly a fundraising organization, the United Way of Escambia County is now a trusted leader of change that engages community resources to improve lives. We provide highly evaluated and measured impacts and investments of funds and volunteer hours are based on positive outcomes

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in health, financial stability and education.

Diverse annual support from 1799 volunteers who donate 29,487 hours enables us to maximize impact. Many of these volunteers work with or are among senior populations. This includes our successful VITA program where they helped 1740 families access \$2.2M in tax refunds in 2012. With a full-time staff position tied to volunteer engagement a resulting 10% increase in growth in volunteerism and bodes well for our management of RSVP. Our longevity partnered with this growth and our continuing ability to recruit quality partnerships attest to sustainability and effectiveness.

As an agency fully accredited by the Better Business Bureau Wise Giving Alliance we meet or exceed all non-profit guideless that benchmark responsible organizations. Financially sound, our CFO demonstrates an in-depth understanding of MIP Fund Accounting. He maintains our books in accordance with GAAP and tracks expenses to the program level. Specific programs and GL accounts are effectively utilized to track revenues awarded and expenses incurred at the departmental and program levels. Without exception, recent audits by external independent auditors have gone smoothly with not material weaknesses. Additionally, our organization and CFO has experience accounting for Federal funds received for the Corporation for National and Community Service and indirect funding through the United Way Worldwide (Emergency Food Shelter Program) as well as the Dept of Public Safety.

We maintain written policies and procedures governing the receipt and disbursement of cash, which include policies designed to ensure segregation of duties between those with custody of cash and those responsible for maintaining the supporting financial records. The CFO reviews existing policies and procedures annually in coordination with the annual audit by external CPA firm. UWEC uses time

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management and purchase order systems to track employee hours and expenses to the various responsible programs and departments. In kind contributions valued by the donor are reviewed by the CFO for reasonableness. While unrecorded on organization books, the Volunteer Manager tracks volunteer time and utilizes The Independent Sector rates to estimate value.

Staff members operate within an organizational hierarchy designed to allow them to effectively contribute to the organization. Each member's job description and annual goals are reviewed in bi-annual evaluations that tie back to the organization's strategic mission and imperatives. The Volunteer/Community Engagement Manager, Mrs. George Coolbaugh would manage RSVP. She utilizes her contacts in the community to the benefit of her volunteers and engages volunteers in useful tasks that challenge them and inspire them to seek additional volunteer opportunities. Mrs. Coolbaugh holds a BA from Pensacola State College. She has extensive sales and development experience, has served as the sponsorship chair for Relay for Life, serves on the Baptist Health Care Women's Advisory Board and a peer elected national sales council. She is creative and committed to serving others.

### Other

Not applicable

### PNS Amendment (if applicable)

Not applicable