# **Index of Exhibits**

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- Exhibit 3 Confirmation of Tax Status
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- Exhibit 6 Qualification Description
- Schedule 1 List of Exchanges

# STATE OF MISSOUR



Jason Kander Secretary of State

# CORPORATION DIVISION CERTIFICATE OF GOOD STANDING

I, JASON KANDER, Secretary of State of the State of Missouri, do hereby certify that the records in my office and in my care and custody reveal that

UNITED WAY OF GREATER KANSAS CITY, INC. N00007521

was created under the laws of this State on the 3rd day of June, 1967, and is in good standing, having fully complied with all requirements of this office.

IN TESTIMONY WHEREOF, I hereunto set my hand and cause to be affixed the GREAT SEAL of the State of Missouri. Done at the City of Jefferson, this 2nd day of August, 2016.

BON Secretary of S

Certification Number: CERT-08022016-0102



# Internal Revenue Service

Date: September 5, 2007

# UNITED WAY OF GREATER KANSAS CITY 1080 WASHINGTON ST KANSAS CITY MO 64105-2216

Department of the Treasury P. O. Box 2508 Cincinnati, OH 45201

Person to Contact: Paul Perry 17-57103 Customer Service Representative Toll Free Telephone Number: 877-829-5500 Federal Identification Number: 44-0545812

Dear Sir or Madam:

This is in response to your request of September 5, 2007, regarding your organization's tax-exempt status.

In December 1947 we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records indicate that your organization is also classified as a public charity under sections 509(a)(1) and 170(b)(1)(A)(vi) of the Internal Revenue Code.

Our records indicate that contributions to your organization are deductible under section 170 of the Code, and that you are qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Internal Revenue Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,

Michele M. Sullivan, Oper. Mgr. Accounts Management Operations 1 Internal Revenue Service Director, Exempt Organizations Rulings and Agreements

Date: AG 30 2007

United Way of Greater Kansas City, Inc. 1080 Washington St Kansas City, MO 64105-2216 Department of the Treasury P.O. Box 2508 Cincinnati, Ohio 45201

Person to Contact - ID#: Dan Berry - 31-07846 Contact Telephone Numbers: 877-829-5500 Phone Federal Identification Number: 44-0545812

Dear Sir or Madam:

By our determination dated December 1947, you were held to be exempt from Federal Income Tax under the provisions of section 501(c)(3) of the Internal Revenue Code.

You recently furnished us information that Bi-County United Way of Cass & Jackson, Inc. and United Way of Johnson County Inc. merged with Heart of America United Way, Inc. Based on the information submitted, we have determined that the merger does not affect your exempt status. The organization will continue using Employer Identification Number 44-0545812 and the organization has changed its name to United Way of Greater Kansas City, Inc.

Please let us know about any further changes in the character, purposes, method of operation, name or address of your organization.

If you have any questions regarding this matter, please contact the person whose name and telephone number appear in the heading of this letter.

Sincerely,

Robert Choi Director, Exempt Organizations Rulings and Agreements

Exhibit 3



# 2015 Snapshot

#### United Way 2-1-1 of Greater Kansas City

is a free, confidential, nationally accredited information and referral service available 24 hours a day. By dialing 2-1-1, a single call connects people in the community with trained call specialists who will guide them to find resources for their specific situation.

The following report is a small snapshot of the data United Way 2-1-1 collects from calls, intended to show trends in needs and areas of our community.

|                      | 2015    | 2014    | Δ%     | Below is a comparison of         |
|----------------------|---------|---------|--------|----------------------------------|
| Total Contacts       | 155,376 | 178,574 | -13.0% | total needs and unmet needs      |
| Total Local Contacts | 134,615 | 161,432 | -17%   | in four impact areas. $\Delta$ % |
| Queue Calls          | 109,190 | 138,820 | -21%   | refers to the "percent change"   |
| Non-queue Calls      | 577     | 649     | -11%   | from 2014 to 2015, first for     |
| Emails               | 56      | 82      | -32%   | total needs, and second for      |
| Web Visitors         | 24,792  | 21,881  | 13%    | unmet needs.                     |
| Total Contract Calls | 20,761  | 17,142  | 21%    |                                  |
|                      |         |         |        |                                  |

| Top 10 Education Needs   | 2015 Total  | Unmet   | % Unmet  | 2014  | Δ%   | Unmet   | Δ%   |
|--|---|---|--|---|--|---|--|
| School Supplies  | 600   | 83  | 13.8%  | 689   | -12.9%   | 105   | -21.0%   |
| GED Instruction  | 106   | 3   | 2.8%   | 203   | -47.8%   | 1   | 200.0%   |
| Parenting Skills Classes   | 71  | 0   | 0.0%   | 47  | 51.1%  | 2   | -100.0%  |
| School Districts   | 62  | 2   | 3.2%   | 69  | -10.1%   | 0   | 100.070  |
| Scholarships   | 28  | 3   | 10.7%  | 25  | 12.0%  | 2   | 50.0%  |
| Adult Basic Education  | 27  | 0   | 0.0%   | 31  | -12.9%   | 0   |  |
| Adult Literacy Programs  | 25  | 0   | 0.0%   | 28  | -10.7%   | 0   |  |
| Head Start   | 24  | 1   | 4.2%   | 15  | 60.0%  | 0   |  |
| Youth Enrichment Programs  | 23  | 3   | 13.0%  | 12  | 91.7%  | 0   |  |
| Education Fee Payment Asst.  | 21  | 7   | 33.3%  | 18  | 16.7%  | 17  | -58.8%   |
| Total Education Needs  | 1,284   | 159   | 12.4%  | 1,456   | -11.8%   | 181   | -12.2%   |
|  | 0016 m · 1  |   | 0/ 71  | 0011  | <b>A</b> 01  |   |  |
| Top 10 Income Needs  | 2015 Total  | Unmet   | % Unmet  | 2014  | Δ%   | Unmet   | Δ%   |
| Electric Service Payment Assist.   | 22,547  | 1,298   | 5.8%   | 26,986  | -16.4%   | 1,741   | -25.4%   |
| Gas Service Payment Assistance   | 8,982   | 510   | 5.7%   | 10,927  | -17.8%   | 691   | -26.2%   |
| Rent Payment Assistance  | 8,559   | 745   | 8.7%   | 10,161  | -15.8%   | 1,028   | -27.5%   |
| Food Pantries  | 6,185   | 196   | 3.2%   | 7,587   | -18.5%   | 140   | 40.0%  |
| Water Service Payment Assist.  | 5,778   | 375<br>283  | 6.5%<br>7.5%   | 5,741   | 0.6%<br>-12.1%   | 385<br>289  | -2.6%<br>-2.1%   |
| Community Shelters   | 3,780   |   | M Press and per-   | 4,302   |  |   |  |
| Tax Preparation  | 2,468   | 155   | 6.3%   | 2,212   | 11.6%  | 93  | 66.7%  |
| Holiday Gifts/Toys   | 1,703   | 101<br>772  | 5.9%   | 1,822   | -6.5%<br>12.4%   | 152<br>796  | -33.6%<br>-3.0%  |
| Rental Deposit Assistance<br>General Furniture Provision   | 1,676   | 130   | 46.1%<br>12.4%   | 1,491   | -26.8%   | 48  | -3.0%<br>170.8%  |
|  | 1,045   |   | Contract Contraction of the  | 1,427   |  |   | -9.1%  |
| Total Income Needs   | 85,449  | 7,688   | 9.0%   | 95,293  | -10.3%   | 8,456   | -9.1%  |
|  |   |   |  |   |  |   |  |
| Top 10 Health Needs  | 2015 Total  | Unmet   | % Unmet  | 2014  | Δ%   | Unmet   | Δ%   |
| Prescription Assistance  | 1173  | 69  | 5.9%   | 1611  | -27.2%   | 84  | -17.9%   |
| Prescription Assistance<br>Certified Application Counselors  | 1173<br>1009  | 69<br>33  | 5.9%<br>3.3%   | 1611<br>833   | -27.2%<br>21.1%  | 84<br>18  | -17.9%<br>83.3%  |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry   | 1173<br>1009<br>650   | 69<br>33<br>27  | 5.9%<br>3.3%<br>4.2%   | 1611<br>833<br>764  | -27.2%<br>21.1%<br>-14.9%  | 84<br>18<br>19  | -17.9%<br>83.3%<br>42.1%   |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics  | 1173<br>1009<br>650<br>645  | 69<br>33<br>27<br>23  | 5.9%<br>3.3%<br>4.2%<br>3.6%   | 1611<br>833<br>764<br>1012  | -27.2%<br>21.1%<br>-14.9%<br>-36.3%  | 84<br>18<br>19<br>30  | -17.9%<br>83.3%<br>42.1%<br>-23.3%   |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics<br>Medical Equipment/Supplies  | 1173<br>1009<br>650<br>645<br>483   | 69<br>33<br>27<br>23<br>8   | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%   | 1611<br>833<br>764<br>1012<br>457   | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%  | 84<br>18<br>19<br>30<br>10  | -17.9%<br>83.3%<br>42.1%   |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics<br>Medical Equipment/Supplies<br>Federal Health Ins Marketplace  | 1173<br>1009<br>650<br>645<br>483<br>418  | 69<br>33<br>27<br>23<br>8<br>0  | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%   | 1611<br>833<br>764<br>1012<br>457<br>218  | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%   | 84<br>18<br>19<br>30<br>10<br>0   | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%   |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics<br>Medical Equipment/Supplies<br>Federal Health Ins Marketplace<br>Glasses/Contacts  | 1173<br>1009<br>650<br>645<br>483<br>418<br>285   | 69<br>33<br>27<br>23<br>8<br>0<br>12  | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%   | 1611<br>833<br>764<br>1012<br>457<br>218<br>330   | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>-13.6%   | 84<br>18<br>19<br>30<br>10<br>0<br>3  | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%   |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics<br>Medical Equipment/Supplies<br>Federal Health Ins Marketplace<br>Glasses/Contacts<br>Hospitals   | 1173<br>1009<br>650<br>645<br>483<br>418<br>285<br>257  | 69<br>33<br>27<br>23<br>8<br>0<br>12<br>5   | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%<br>1.9%   | 1611<br>833<br>764<br>1012<br>457<br>218<br>330<br>198  | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>-13.6%<br>29.8%  | 84<br>18<br>19<br>30<br>10<br>0<br>3<br>3   | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%<br>66.7%  |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics<br>Medical Equipment/Supplies<br>Federal Health Ins Marketplace<br>Glasses/Contacts<br>Hospitals<br>Case/Care Management   | 1173<br>1009<br>650<br>645<br>483<br>418<br>285<br>257<br>251   | 69<br>33<br>27<br>23<br>8<br>0<br>12<br>5<br>4  | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%<br>1.9%<br>1.6%   | 1611<br>833<br>764<br>1012<br>457<br>218<br>330<br>198<br>274   | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>-13.6%<br>29.8%<br>-8.4%   | 84<br>18<br>19<br>30<br>10<br>0<br>3<br>3<br>2  | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%<br>66.7%<br>100.0%  |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics<br>Medical Equipment/Supplies<br>Federal Health Ins Marketplace<br>Glasses/Contacts<br>Hospitals<br>Case/Care Management<br>Medical Care Expense Asst  | 1173<br>1009<br>650<br>645<br>483<br>418<br>285<br>257<br>251<br>195  | 69<br>33<br>27<br>23<br>8<br>0<br>12<br>5<br>4<br>42  | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%<br>1.9%<br>1.6%<br>21.5%  | 1611<br>833<br>764<br>1012<br>457<br>218<br>330<br>198<br>274<br>155  | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>-13.6%<br>29.8%<br>-8.4%<br>25.8%  | 84<br>18<br>19<br>30<br>10<br>0<br>3<br>3<br>2<br>91  | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%<br>66.7%<br>100.0%<br>-53.8%  |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics<br>Medical Equipment/Supplies<br>Federal Health Ins Marketplace<br>Glasses/Contacts<br>Hospitals<br>Case/Care Management   | 1173<br>1009<br>650<br>645<br>483<br>418<br>285<br>257<br>251   | 69<br>33<br>27<br>23<br>8<br>0<br>12<br>5<br>4  | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%<br>1.9%<br>1.6%   | 1611<br>833<br>764<br>1012<br>457<br>218<br>330<br>198<br>274   | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>-13.6%<br>29.8%<br>-8.4%   | 84<br>18<br>19<br>30<br>10<br>0<br>3<br>3<br>2  | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%<br>66.7%<br>100.0%  |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics<br>Medical Equipment/Supplies<br>Federal Health Ins Marketplace<br>Glasses/Contacts<br>Hospitals<br>Case/Care Management<br>Medical Care Expense Asst  | 1173<br>1009<br>650<br>645<br>483<br>418<br>285<br>257<br>251<br>195  | 69<br>33<br>27<br>23<br>8<br>0<br>12<br>5<br>4<br>42  | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%<br>1.9%<br>1.6%<br>21.5%  | 1611<br>833<br>764<br>1012<br>457<br>218<br>330<br>198<br>274<br>155  | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>-13.6%<br>29.8%<br>-8.4%<br>25.8%  | 84<br>18<br>19<br>30<br>10<br>0<br>3<br>3<br>2<br>91  | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%<br>66.7%<br>100.0%<br>-53.8%  |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics<br>Medical Equipment/Supplies<br>Federal Health Ins Marketplace<br>Glasses/Contacts<br>Hospitals<br>Case/Care Management<br>Medical Care Expense Asst<br><b>Total Health Needs</b>   | 1173<br>1009<br>650<br>645<br>483<br>418<br>285<br>257<br>251<br>195<br>11,150  | 69<br>33<br>27<br>23<br>8<br>0<br>12<br>5<br>4<br>42<br>790   | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%<br>1.9%<br>1.6%<br>21.5%<br>7.1%  | 1611<br>833<br>764<br>1012<br>457<br>218<br>330<br>198<br>274<br>155<br><b>11,596</b>   | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>-13.6%<br>29.8%<br>-8.4%<br>25.8%<br>-3.8%   | 84<br>18<br>19<br>30<br>10<br>0<br>3<br>3<br>2<br>91<br>644   | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%<br>66.7%<br>100.0%<br>-53.8%<br>22.7%   |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics<br>Medical Equipment/Supplies<br>Federal Health Ins Marketplace<br>Glasses/Contacts<br>Hospitals<br>Case/Care Management<br>Medical Care Expense Asst<br><b>Total Health Needs</b><br>Top 10 Other Needs   | 1173<br>1009<br>650<br>645<br>483<br>418<br>285<br>257<br>251<br>195<br><b>11,150</b><br>2015 Total   | 69<br>33<br>27<br>23<br>8<br>0<br>12<br>5<br>4<br>42<br>790   | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%<br>1.9%<br>1.6%<br>21.5%<br>7.1%  | 1611<br>833<br>764<br>1012<br>457<br>218<br>330<br>198<br>274<br>155<br><b>11,596</b><br>2014   | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>91.7%<br>29.8%<br>-3.6%<br>25.8%<br>-3.8%  | 84<br>18<br>19<br>30<br>10<br>0<br>3<br>3<br>2<br>91<br>644<br>Unmet  | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%<br>66.7%<br>100.0%<br>-53.8%<br>22.7%   |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics<br>Medical Equipment/Supplies<br>Federal Health Ins Marketplace<br>Glasses/Contacts<br>Hospitals<br>Case/Care Management<br>Medical Care Expense Asst<br><b>Total Health Needs</b><br><b>Top 10 Other Needs</b><br>Veterans Benefits Assistance  | 1173<br>1009<br>650<br>645<br>483<br>418<br>285<br>257<br>251<br>195<br>11,150<br>2015 Total<br>696   | 69<br>33<br>27<br>23<br>8<br>0<br>12<br>5<br>4<br>42<br>790<br>Unmet<br>2   | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%<br>1.9%<br>1.6%<br>21.5%<br>7.1%<br>% Unmet<br>0.3%   | 1611<br>833<br>764<br>1012<br>457<br>218<br>330<br>198<br>274<br>155<br>11,596<br>2014<br>111   | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>91.7%<br>91.7%<br>29.8%<br>-3.8%<br>25.8%<br>-3.8%<br>527.0%   | 84<br>18<br>19<br>30<br>10<br>0<br>3<br>3<br>2<br>91<br>644<br>Unmet<br>0                                     | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%<br>66.7%<br>100.0%<br>-53.8%<br>22.7%<br>▲%   |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics<br>Medical Equipment/Supplies<br>Federal Health Ins Marketplace<br>Glasses/Contacts<br>Hospitals<br>Case/Care Management<br>Medical Care Expense Asst<br><b>Total Health Needs</b><br><b>Top 10 Other Needs</b><br>Veterans Benefits Assistance<br>City Government Info Lines  | 1173<br>1009<br>650<br>645<br>483<br>418<br>285<br>257<br>251<br>195<br><b>11,150</b><br>2015 Total<br>696<br>597   | 69<br>33<br>27<br>23<br>8<br>0<br>12<br>5<br>4<br>42<br>790<br>Unmet<br>2<br>5  | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%<br>1.9%<br>1.6%<br>21.5%<br>7.1%<br>% Unmet<br>0.3%<br>0.8%   | 1611<br>833<br>764<br>1012<br>457<br>218<br>330<br>198<br>274<br>155<br><b>11,596</b><br><b>2014</b><br>111<br>284  | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>-13.6%<br>29.8%<br>-8.4%<br>25.8%<br>-3.8%<br><b>2</b> 5.2%<br>527.0%<br>110.2%  | 84<br>18<br>19<br>30<br>10<br>0<br>3<br>3<br>2<br>91<br>644<br>Unmet<br>0<br>1                                | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%<br>66.7%<br>100.0%<br>-53.8%<br>22.7%<br>▲%   |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics<br>Medical Equipment/Supplies<br>Federal Health Ins Marketplace<br>Glasses/Contacts<br>Hospitals<br>Case/Care Management<br>Medical Care Expense Asst<br><b>Total Health Needs</b><br><b>Top 10 Other Needs</b><br>Veterans Benefits Assistance<br>City Government Info Lines<br>Landlord/Tenant Assistance  | 1173<br>1009<br>650<br>645<br>483<br>418<br>285<br>257<br>251<br>195<br><b>11,150</b><br>2015 Total<br>696<br>597<br>384                                    | 69<br>33<br>27<br>23<br>8<br>0<br>12<br>5<br>4<br>42<br><b>790</b><br><b>Unmet</b><br>2<br>5<br>5<br>5                                    | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%<br>1.9%<br>1.6%<br>21.5%<br>7.1%<br>%<br>Unmet<br>0.3%<br>0.8%<br>1.3%  | 1611<br>833<br>764<br>1012<br>457<br>218<br>330<br>198<br>274<br>155<br><b>11,596</b><br><b>2014</b><br>111<br>284<br>329   | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>-13.6%<br>29.8%<br>-8.4%<br>25.8%<br>-3.8%<br><b>2</b> 5.8%<br>-3.8%<br><b>2</b> 5.7.0%<br>110.2%<br>17%   | 84<br>18<br>19<br>30<br>10<br>0<br>3<br>3<br>2<br>91<br>644<br>Unmet<br>0<br>1<br>3                           | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%<br>66.7%<br>100.0%<br>-53.8%<br>22.7%<br>▲%   |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics<br>Medical Equipment/Supplies<br>Federal Health Ins Marketplace<br>Glasses/Contacts<br>Hospitals<br>Case/Care Management<br>Medical Care Expense Asst<br><b>Total Health Needs</b><br><b>Top 10 Other Needs</b><br>Veterans Benefits Assistance<br>City Government Info Lines<br>Landlord/Tenant Assistance<br>2-1-1 Systems   | 1173<br>1009<br>650<br>645<br>483<br>418<br>285<br>257<br>251<br>195<br><b>11,150</b><br><b>2015 Total</b><br>696<br>597<br>384<br>352                      | 69<br>33<br>27<br>23<br>8<br>0<br>12<br>5<br>4<br>4<br>2<br><b>790</b><br><b>Unmet</b><br>2<br>5<br>5<br>1                                | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%<br>1.9%<br>1.6%<br>21.5%<br>7.1%<br>%<br>Unmet<br>0.3%<br>0.8%<br>1.3%<br>0.3%                                      | 1611<br>833<br>764<br>1012<br>457<br>218<br>330<br>198<br>274<br>155<br>11,596<br>2014<br>111<br>284<br>329<br>451  | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>-13.6%<br>29.8%<br>-8.4%<br>25.8%<br>-3.8%<br>527.0%<br>110.2%<br>17%<br>-22.0%  | 84<br>18<br>19<br>30<br>10<br>0<br>3<br>2<br>91<br>644<br>Unmet<br>0<br>1<br>3<br>3                           | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%<br>66.7%<br>100.0%<br>-53.8%<br>22.7%<br>▲%<br>400.0%<br>66.7%<br>-66.7%                    |
| Prescription Assistance         Certified Application Counselors         General Dentistry         Community Clinics         Medical Equipment/Supplies         Federal Health Ins Marketplace         Glasses/Contacts         Hospitals         Case/Care Management         Medical Care Expense Asst         Total Health Needs         Top 10 Other Needs         Veterans Benefits Assistance         City Government Info Lines         Landlord/Tenant Assistance         2-1-1 Systems         Area Agencies on Aging         Legal Counseling  | 1173<br>1009<br>650<br>645<br>483<br>418<br>285<br>257<br>251<br>195<br><b>11,150</b><br><b>2015 Total</b><br>696<br>597<br>384<br>352<br>345               | 69<br>33<br>27<br>23<br>8<br>0<br>12<br>5<br>4<br>42<br><b>790</b><br><b>Unmet</b><br>2<br>5<br>5<br>1<br>8                               | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%<br>1.9%<br>1.6%<br>21.5%<br>7.1%<br>% Unmet<br>0.3%<br>0.8%<br>1.3%<br>0.3%<br>2.3%                                 | 1611           833           764           1012           457           218           330           198           274           155           11,596           2014           111           284           329           451                             | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>-13.6%<br>29.8%<br>-8.4%<br>25.8%<br>-3.8%<br><b>2</b> %<br>527.0%<br>110.2%<br>17%<br>-22.0%<br>-23.5%  | 84<br>18<br>19<br>30<br>10<br>0<br>3<br>2<br>91<br>644<br>Unmet<br>0<br>1<br>3<br>3<br>3                      | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%<br>66.7%<br>100.0%<br>-53.8%<br>22.7%<br>▲%<br>400.0%<br>66.7%<br>-66.7%<br>166.7%          |
| Prescription Assistance         Certified Application Counselors         General Dentistry         Community Clinics         Medical Equipment/Supplies         Federal Health Ins Marketplace         Glasses/Contacts         Hospitals         Case/Care Management         Medical Care Expense Asst         Total Health Needs         Top 10 Other Needs         Veterans Benefits Assistance         City Government Info Lines         Landlord/Tenant Assistance         2-1-1 Systems         Area Agencies on Aging         Legal Counseling         ID Card Fee Payment Assistance   | 1173<br>1009<br>650<br>645<br>483<br>418<br>285<br>257<br>251<br>195<br>11,150<br>2015 Total<br>696<br>597<br>384<br>352<br>345<br>330<br>298               | 69<br>33<br>27<br>23<br>8<br>0<br>12<br>5<br>4<br>42<br><b>790</b><br><b>Unmet</b><br>2<br>5<br>5<br>1<br>8<br>8<br>8<br>11               | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%<br>1.9%<br>1.6%<br>21.5%<br>7.1%<br>% Unmet<br>0.3%<br>0.8%<br>1.3%<br>0.3%<br>2.3%<br>2.4%<br>3.7%                 | 1611           833           764           1012           457           218           330           198           274           155           11,596           2014           111           284           329           451           410           213 | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>-13.6%<br>29.8%<br>-8.4%<br>25.8%<br>-3.8%<br>527.0%<br>110.2%<br>17%<br>-22.0%<br>-23.5%<br>-19.5%<br>39.9%                                       | 84<br>18<br>19<br>30<br>10<br>0<br>3<br>2<br>91<br>644<br>Unmet<br>0<br>1<br>3<br>3<br>7<br>92                | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%<br>66.7%<br>100.0%<br>-53.8%<br>22.7%<br>▲%<br>400.0%<br>66.7%<br>166.7%<br>14.3%<br>-88.0% |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics<br>Medical Equipment/Supplies<br>Federal Health Ins Marketplace<br>Glasses/Contacts<br>Hospitals<br>Case/Care Management<br>Medical Care Expense Asst<br><b>Total Health Needs</b><br><b>Top 10 Other Needs</b><br>Veterans Benefits Assistance<br>City Government Info Lines<br>Landlord/Tenant Assistance<br>2-1-1 Systems<br>Area Agencies on Aging<br>Legal Counseling<br>ID Card Fee Payment Assistance<br>Courts   | 1173<br>1009<br>650<br>645<br>483<br>418<br>285<br>257<br>251<br>195<br>11,150<br>2015 Total<br>696<br>597<br>384<br>352<br>345<br>330<br>298<br>292        | 69<br>33<br>27<br>23<br>8<br>0<br>12<br>5<br>4<br>42<br><b>790</b><br><b>Unmet</b><br>2<br>5<br>5<br>1<br>8<br>8<br>8<br>11<br>6          | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%<br>1.9%<br>1.6%<br>21.5%<br>7.1%<br><b>% Unmet</b><br>0.3%<br>0.8%<br>1.3%<br>0.3%<br>2.3%<br>2.4%<br>3.7%<br>2.1%  | 1611<br>833<br>764<br>1012<br>457<br>218<br>330<br>198<br>274<br>155<br><b>11,596</b><br><b>2014</b><br>111<br>284<br>329<br>451<br>451<br>410<br>213<br>173  | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>-13.6%<br>29.8%<br>-8.4%<br>25.8%<br>-3.8%<br><b>2</b> %<br>527.0%<br>110.2%<br>17%<br>-22.0%<br>-3.5%<br>-19.5%<br>39.9%<br>68.8%                 | 84<br>18<br>19<br>30<br>10<br>0<br>3<br>2<br>91<br>644<br>Unmet<br>0<br>1<br>3<br>3<br>3<br>7<br>92<br>2      | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%<br>66.7%<br>100.0%<br>-53.8%<br>22.7%<br>▲%<br>400.0%<br>66.7%<br>-66.7%<br>166.7%<br>14.3% |
| Prescription Assistance         Certified Application Counselors         General Dentistry         Community Clinics         Medical Equipment/Supplies         Federal Health Ins Marketplace         Glasses/Contacts         Hospitals         Case/Care Management         Medical Care Expense Asst         Total Health Needs         Top 10 Other Needs         Veterans Benefits Assistance         City Government Info Lines         Landlord/Tenant Assistance         2-1-1 Systems         Area Agencies on Aging         Legal Counseling         ID Card Fee Payment Assistance         Courts         Specialized Information & Referral | 1173<br>1009<br>650<br>645<br>483<br>418<br>285<br>257<br>251<br>195<br>11,150<br>2015 Total<br>696<br>597<br>384<br>352<br>345<br>330<br>298<br>292<br>291 | 69<br>33<br>27<br>23<br>8<br>0<br>12<br>5<br>4<br>4<br>2<br><b>790</b><br><b>Unmet</b><br>2<br>5<br>5<br>1<br>8<br>8<br>8<br>11<br>6<br>1 | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%<br>1.9%<br>1.6%<br>21.5%<br>7.1%<br>% Unmet<br>0.3%<br>0.8%<br>1.3%<br>0.3%<br>2.3%<br>2.4%<br>3.7%<br>2.1%<br>0.3% | 1611<br>833<br>764<br>1012<br>457<br>218<br>330<br>198<br>274<br>155<br><b>11,596</b><br><b>2014</b><br>111<br>284<br>329<br>451<br>451<br>451<br>410<br>213<br>173<br>202  | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>-13.6%<br>29.8%<br>-8.4%<br>25.8%<br>-3.8%<br><b>Δ%</b><br>527.0%<br>110.2%<br>17%<br>-22.0%<br>110.2%<br>17%<br>-23.5%<br>39.9%<br>68.8%<br>44.1% | 84<br>18<br>19<br>30<br>10<br>0<br>3<br>2<br>91<br>644<br>Unmet<br>0<br>1<br>3<br>3<br>3<br>7<br>92<br>2<br>0 | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%<br>66.7%<br>100.0%<br>-53.8%<br>22.7%<br>▲%<br>400.0%<br>66.7%<br>166.7%<br>14.3%<br>-88.0% |
| Prescription Assistance<br>Certified Application Counselors<br>General Dentistry<br>Community Clinics<br>Medical Equipment/Supplies<br>Federal Health Ins Marketplace<br>Glasses/Contacts<br>Hospitals<br>Case/Care Management<br>Medical Care Expense Asst<br><b>Total Health Needs</b><br><b>Top 10 Other Needs</b><br>Veterans Benefits Assistance<br>City Government Info Lines<br>Landlord/Tenant Assistance<br>2-1-1 Systems<br>Area Agencies on Aging<br>Legal Counseling<br>ID Card Fee Payment Assistance<br>Courts   | 1173<br>1009<br>650<br>645<br>483<br>418<br>285<br>257<br>251<br>195<br>11,150<br>2015 Total<br>696<br>597<br>384<br>352<br>345<br>330<br>298<br>292        | 69<br>33<br>27<br>23<br>8<br>0<br>12<br>5<br>4<br>42<br><b>790</b><br><b>Unmet</b><br>2<br>5<br>5<br>1<br>8<br>8<br>8<br>11<br>6          | 5.9%<br>3.3%<br>4.2%<br>3.6%<br>1.7%<br>0.0%<br>4.2%<br>1.9%<br>1.6%<br>21.5%<br>7.1%<br><b>% Unmet</b><br>0.3%<br>0.8%<br>1.3%<br>0.3%<br>2.3%<br>2.4%<br>3.7%<br>2.1%  | 1611<br>833<br>764<br>1012<br>457<br>218<br>330<br>198<br>274<br>155<br><b>11,596</b><br><b>2014</b><br>111<br>284<br>329<br>451<br>451<br>410<br>213<br>173  | -27.2%<br>21.1%<br>-14.9%<br>-36.3%<br>5.7%<br>91.7%<br>-13.6%<br>29.8%<br>-8.4%<br>25.8%<br>-3.8%<br><b>2</b> %<br>527.0%<br>110.2%<br>17%<br>-22.0%<br>-3.5%<br>-19.5%<br>39.9%<br>68.8%                 | 84<br>18<br>19<br>30<br>10<br>0<br>3<br>2<br>91<br>644<br>Unmet<br>0<br>1<br>3<br>3<br>3<br>7<br>92<br>2      | -17.9%<br>83.3%<br>42.1%<br>-23.3%<br>-20.0%<br>300.0%<br>66.7%<br>100.0%<br>-53.8%<br>22.7%<br>▲%<br>400.0%<br>66.7%<br>166.7%<br>14.3%<br>-88.0% |



| Callers by Top 10 Counties  | Sale of | Name and |
|-----------------------------|---------|----------|
| Jackson, MO                 | 56,572  | 59.5%    |
| Wyandotte, KS               | 7,508   | 7.9%     |
| Johnson, KS                 | 5,810   | 6.1%     |
| Clay, MO                    | 5,693   | 6.0%     |
| Platte, MO                  | 1,645   | 1.7%     |
| Cass, MO                    | 1,199   | 1.3%     |
| Buchanan, MO                | 978     | 1.0%     |
| Leavenworth, KS             | 497     | 0.5%     |
| Lafayette, MO               | 296     | 0.3%     |
| Pettis, MO                  | 267     | 0.3%     |
|                             |         |          |
| Callers by Top 10 Zip Codes |         |          |
|                             |         |          |

| Callers by Top 10 Zip Codes |       |      |
|-----------------------------|-------|------|
| 64130 (Kansas City, MO)     | 6,691 | 7.0% |
| 64132 (Kansas City, MO)     | 4,323 | 4.5% |
| 64128 (Kansas City, MO)     | 3,735 | 3.9% |
| 64127 (Kansas City, MO)     | 3,614 | 3.8% |
| 64134 (Kansas City, MO)     | 3,360 | 3.5% |
| 64131 (Kansas City, MO)     | 2,604 | 2.7% |
| 64133 (Kansas City/Raytown) | 2,512 | 2.6% |
| 64110 (Kansas City, MO)     | 2,393 | 2.5% |
| 64109 (Kansas City, MO)     | 2,392 | 2.5% |
| 64138 (Kansas City/Raytown) | 2,274 | 2.4% |
|                             |       |      |

| Callers by Age |        |       |  |
|----------------|--------|-------|--|
| 17 & Under     | 121    | 0.3%  |  |
| 18 - 39        | 22,058 | 48.7% |  |
| 40-59          | 16,211 | 35.8% |  |
| 60 and over    | 6,902  | 15.2% |  |

| Callers by Employment Status         |                           |                         |
|--------------------------------------|---------------------------|-------------------------|
| Full Time                            | 10 707                    | 24.5%                   |
| Part Time                            |                           | 24.5%<br>16.9%          |
| Unemployed (not retired)             | 23,119                    |                         |
| ,                                    |                           |                         |
| Retired (not employed)               | 2,527                     | 5.8%                    |
| Callers by Ethnicity                 |                           |                         |
| Black/African American               | 24,034                    | 56.9%                   |
| White/Caucasian                      | 15,072                    |                         |
| Hispanic/Latino                      | 1,554                     | 3.7%                    |
| Other/Multiracial                    | 1,068                     | 2.5%                    |
| American Indian/Alaskan Native       | 205                       |                         |
| Asian                                | 197                       | 0.5%                    |
| Hawaiian/Pacific Islander            | 119                       | 0.3%                    |
|                                      |                           |                         |
| Callers by Marital Status            |                           |                         |
| Single                               | 29,504                    | 66.5%                   |
| Married                              | 6,618                     | 14.9%                   |
| Divorced                             | 3,049                     | 6.9%                    |
| Separated                            | 2,115                     | 4.8%                    |
| Living Together                      | 1,587                     | 3.6%                    |
| Widowed                              | 1,503                     | 3.4%                    |
|                                      |                           |                         |
| Other Demographics                   |                           |                         |
| Veterans/Military                    | 2 502                     | 8.5%                    |
|                                      | 2,503                     | 8.3%                    |
| Homeless or At-Risk                  |                           | 8.5%<br>13.5%           |
| Homeless or At-Risk<br>Have Children |                           | 13.5%                   |
|                                      | 5,022                     | 13.5%<br>58.3%          |
| Have Children                        | 5,022<br>24,590           | 13.5%<br>58.3%<br>57.6% |
| Have Children<br>First Time Callers  | 5,022<br>24,590<br>34,856 | 13.5%<br>58.3%<br>57.6% |

# Exhibit 4

# United Way 2-1-1/United Way of Greater Kansas City Database Inclusion/Exclusion Criteria

United Way 2-1-1 of Greater Kansas City follows the standard practices established by the Alliance of Information and Referral Systems (AIRS) for inclusion/exclusion criteria. Criteria determine the organizations that will be included in or excluded from the resource database of United Way 2-1-1.

# **Requirements for Inclusion:**

1) The agency/service provider must provide a human service to the public that can be referred to by 2-1-1; definition below

The activities of human services professionals which help people become more self-sufficient, sustain independence, strengthen family relationships, support personal and social development and ensure the well-being of individuals, families, groups and communities. Specific human services include ensuring that people have access to adequate food, shelter, clothing and transportation; financial resources to meet their needs; consumer education and decision support, criminal justice or legal services; education and employment; health and mental health care including substance abuse services; and environmental protection; both routinely and in times of disaster or other emergencies. Human services also facilitate the capabilities of people to care for children or other dependents; ensure that protective services are available to those who are vulnerable; provide for the support of older adults and individuals with disabilities; offer social, faith-based and leisure-time activities; provide for the cultural enrichment of the community; and ensure that people have the information they need to fully participate in community life.

NOTE: From the Alliance of Information and Referral Systems (AIRS), as adapted from the definition of "social work" in the Dictionary of Social Work published by the National Association of Social Work.

- 2) The agency/service provider must serve the residents of the United Way 2-1-1 23 county coverage region
- 3) The agency/service provider may be either government or non-profit 501-(C) 3. For-profit organizations and unincorporated groups meeting critical human service needs which are not covered by a governmental or nonprofit organization may also be included following review and determination that services are vital for inclusion.
- 4) Services consistently and systemically tracked by another organization that gives referrals to the public may be included or excluded at the option of United Way 2-1-1 (i.e. mental health practitioners in areas with a comprehensive mental health referral service)
- 5) The agency/service provider must have been in existence more than 6 months in order to indicate a degree of permanence, unless either of the following is the case: is an affiliate of an established service provider with multiple locations; or is the result of a community or coalition planning process

# **Inclusion Examples:**

- Other agencies providing information and referral; including specialized I&R's
- Essential service agencies (food, shelter, clothing) such as congregate meal sites, food pantries, soup kitchens, community food banks, clothing closets, etc.
- Government agencies (local, state, federal)
- Agencies located in bordering states if they serve residents of the United Way 2-1-1 coverage region
- Advocacy organizations related to health and human service issues
- Self-help support groups (local, state, regional, national)
- Licensed for-profit and non-for-profit hospitals
- Nonprofit adult day services, and clinics
- Nonprofit home health and hospice providers (For profit home health providers may be included if they offer a service or cover an area not covered by nonprofits)
- Hotlines and other general and specialized information and referral services administered by not-for-profit
  organizations
- Consumer protection resources and basic business assistance services that are government designated or contracted or nonprofit
- Educational resources, including schools for special needs

- National organizations serving residents in the United Way 2-1-1 coverage region
- Housing referral organizations
- Organizations, such as faith-based and civic groups, that offer a service for the community at large which is not restricted to their members
- Social or fraternal organizations that perform a community service
- Local, state and federal emergency management agencies
- Jurisdictional health departments, clinics and community services
- For-profit organizations offering a service that is not easily accessible in the public-non-profit sector (such as summer camps)
- Websites or online only organizations that meet other inclusion criteria and have staff accessible for updating
- Others as determined appropriate after review

# **Exclusion Examples:**

- Organizations which discriminate on the basis of ethnicity, age, gender, religion or sexual orientation
- Organizations engaged in illegal or fraudulent activities
- Agencies which misrepresent their services in any way, including non-delivery of listed services
- Individual practitioners
- Organizations and/or professionals which are not licensed, if service is in an area where licensing standards exist
- Political advocacy groups such as pro-choice and pro-life, pro-gun and anti-gun control groups
- Faith-based community programs that provide services only to their own members
- National organizations with local chapters that directly administer services. The local chapter can be listed, and their affiliation may be noted in their description. However, if the national organization also delivers services to the public, it will also be listed.
- Organizations that exist solely to serve the clients of another service provider. For example, if a counseling service only serves clients of MO FSD under a contract, the counseling service will not be included.
- For-profit organizations that offer and charge for hotlines, other general and specialized information and referral, group therapy, support groups, etc.
- Trade associations
- For-profit home care businesses that do not offer home health services such as nursing or home health aides
- Long term and continuing care facilities
- Professional associations
- Chambers of Commerce
- Programs that have continually changing hours or locations and do not have a public point of contact
- Insurance providers, for-profit transportation providers, faith-based organizations that don't offer a human service
- Others as determined after review

# Disclaimer:

- Special conditions may apply for agencies and or programs that serve vulnerable populations, programs will be reviewed for inclusion.
- Inclusion of a program/service does not in any way represent or imply a determination or approval of the quality of those services; nor does it imply endorsement by United Way 2-1-1.
- Exclusion does not reflect on any organization's contribution to the community.
- United Way 2-1-1 may reserve the right to review an organization/program/service for inclusion based on additional criteria such as: Board of Directors oversight, number of hours the telephone number is answered, whether there is at least one paid employee, etc.)
- \*\*\*Inclusion/Exclusion Criteria will be reviewed at least once every 2 years to ensure that the resource database is addressing the changing needs of the community.

# **Technical Competency:**

United Way of Greater Kansas City (UWGKC) maintains the technical competence to operate United Way 211. The technical support, primarily provided by the IT department, is complemented by the knowledge of the 211 management team.

Bowman Service Point is an Internet based SaaS application that provides ease and flexible methods in accessing the 211 software. Staff can utilize the flexibility of the application to make customizations. Found within the call center, a 40" high definition monitor displays pertinent information regarding in-call and in-queue statistics to all call specialists. UWGKC 211 maintains three fully equipped and functional training environments for coaching and monitoring and overflow as the need arise.

The UWGKC 211 building has a 100 KW generator capable of supplying all of the buildings electrical needs. The generator can run in excess of 72 hours without refueling and will auto transfers between utility and generator power as needed. An in-production maintenance and refueling plan is in place to ensure continuous readiness. In addition to the generator, a second contingency was designed and put in place. Using VPN, Soft Phones, and 14 specially configured laptops for remote operation, an additional level of contingency that prevents 211 service disruptions.

UWGKC 211 installed a new 5MBs wireless internet access for our guest users that is independent of our business network infrastructure. This provides an Internet capable environment for guests, but does not allow any access to the UWGKC network which would compromise the network

The 211 operation is connected to the 801 W 47<sup>th</sup> St Plaza office via MPLS connection. This design is to allow for built in redundancy for the VoIP system. Router – Cisco IAD 2400 series routers are used for MPLS connectivity. Fortinet Firewall was implemented to provide advanced security and intrusion prevention. The structured wiring solution has increased speed and reduced latency. The Infrastructure is designed to have an automatic fail-up to our 801 Plaza building. This tested solution minimizes lost calls and maximizes uptime for the 211 operation.

ShorTel VoIP implementation five years ago and was upgraded in May 2016 placing us on a digital platform for our telecom. Management is equipped with Unified Messaging. This bundle of services permits emails to be delivered to smart phones, voicemail to be delivered to e-mail via .wav, and faxes to be delivered to personal fax lines. Additionally, this feature rich solution has assisted the staff to be more effective and, efficient. The VoIP system has proved its worth by providing a high level of call queue handling and manageability, ensuring quality of service.

The IRIS application resides at the 211 facility in a near-line status allowing the appropriate staff the capability to review historical data for reporting and trends. In July 2011, UWGKC installed a sophisticated call recording and monitoring system by ShoreTel, recording all United Way 2-1-1 calls for quality assurance purposes.

ServicePoint information and referral software, recently upgraded to version 5.12.22, has been operational since March 2013; and aligns UWGKC to be fully compliant with Alliance of Information and Referral Systems (AIRS) standards required for call center accreditation. The ServicePoint software is supported through contract with its developer Bowman Systems and by a UWGKC internal IT staff of three.

# **Financial Competency:**

United Way of Greater Kansas City is a 501(c) (3) not for Profit Corporation registered in the states of Missouri and Kansas. UWGKC has an annual budget of over \$34,709,000 with program services and distributions \$30,065,000 UWGKC has a financial staff of seven full-time individuals dedicated to complete and accurate financial management. UWGKC is audited on an annual basis and files an annual Form 990 with the Internal Revenue Service. UWGKC is governed by a Board of Trustees comprised of community volunteers and business leaders. In addition, a Finance Committee oversees financial management operations and processes, and provides the Board with recommendations.

# Managerial and Operational Staff Competency:

Director, Gary Thurman has worked for United Way 2-1-1 for five years with 2 ½ years in management of the Call Center. Gary Thurman is a retired police captain with 30 years law enforcement experience of which 16 years was in supervisory and management positions. Two years of this was as supervisor in the 9-1-1 dispatch call center. Gary has a B.A in Sociology an M.S. in Administration of Justice, completed the Administrative Officers Course at the Southern Police Institute and has numerous emergency management certifications from FEMA resulting in an Advance Professional Development Certificate. Gary is a Certified Information and Referral Specialist (CIRS) through the Alliance of Information and Referral Systems and has completed the Certified Call Center Managers Course through the Resource Center for Customer Service Professionals.

Call Center Manager, Kristen Womack, has 3 years of assistant management experience. She has worked in the nonprofit sector for 6 years including 1 ½ years of experience serving as a therapist for a domestic violence shelter as well as 2 years serving as an AmeriCorps VISTA member serving veteran students then homeless individuals and families. In addition to this experience, she has over 10 years of customer service experience. Kristen is an AIRS Certified Information and Referral Specialist. She received a MA in Marriage and Family Therapy which has been utilized in her current position to help improve quality assurance and provide coaching to the team of Call Specialist.

Resource Center Manager, Jennifer Miller has 10 years of experience in development and maintenance of the UWGKC 2-1-1 resource database. In addition, she is an AIRS Certified Resource Specialist, has previously served as Call Center Manager at 2-1-1, and is currently attending UMKC. Jennifer Miller was promoted to Call Center Supervisor on July 1, 2011 and has been the Resource Center Manager since September of 2013.

United Way 2-1-1 is currently has 5 full-time and 15 part time Call Specialists of whom 8 are AIRS certified; 1 full time Resource Specialist, 1 Full-time Resource and Referral Specialist, 1 Quality Assurance Specialist (AIRS Certified), 1 full time Older Adult Specialist (AIRS Certified), and 1 Veteran's Navigator. Most of the staff members have direct work experience in health and human service agencies. All Call Specialists are eligible to test for AIRS certification following 3 years of employment with a HS diploma or GED, 2 years with a Community College degree and 1 year with a Bachelor's degree or higher degree. Currently 50% of the eligible staff of United Way 2-1-1 is AIRS certified. AIRS requires 25 % of eligible staff to be certified.

# SCHEDULE 1 TO REAPPLICATION

# Andrew County: Fillmore Bolckow Whitesville Rosendale Savannah Amazonia Avenue City Helena Cosby Union Star King City

#### Jackson County:

Graham

Barnard

Kansas City Buckner Grain Valley Lake Lotawana Greenwood Lone Jack Oak Grove Pleasant Hill Wellington

# **Buchanan County:**

St. Joseph San Antonio Easton Agency Gower Rushville Atchison DeKalb Dearborn Edgerton

# **DeKalb County:**

Union Star King City Maysville Clarksdale San Antonio Stewartsville Osborn Cameron Pattonsburg Darlington

# **Clinton County:**

San Antonio Easton Stewartsville Osborn Cameron Gower Edgerton Trimble Plattsburg Lathrop Holt Lawson Turney

#### Caldwell County:

Cameron Kidder Hamilton Lathrop Kingston Polo Cowgill Braymer Breckenridge Lock Springs

#### Lafayette County:

Oak Grove Wellington Lexington Waverly Alma Blackburn Concordia Higginsville Odessa Platte County: Atchison DeKalb Dearborn Weston Camden Point Platte City Smithville Farley Leavenworth Ferrilview Kansas City

# Clay County:

Smithville Kearney Holt Excelsior Springs Lawson Kansas City Missouri City

# **Ray County:**

Lawson Polo Cowgill Stet Hardin Henrietta Richmond Orrick Excelsior Springs Knoxville

#### **Cass County:**

Kansas City Greenwood Pleasant Hill Lone Jack Cleveland Peculiar Freeman Harrisonville East Lynne Drexel Archie Garden City Creighton Strasburg

# Johnson County:

Lone Jack Holden Odessa Warrensburg Concordia Knob Noster Windsor Centerview Leeton Chilhowee Blairstown Creighton Kingsville

#### Saline County:

Waverly Malta Bend Miami Slater Gilliam Blackburn Marshall Sweet Springs Concordia Houstonia Marshall Junction Nelson Blackwater Arrow Rock Alma

#### **Pettis County:**

Sweet Springs Concordia Houstonia Marshall Junction Knob Noster Lamonte Sedalia Otterville Smithton Cole Camp Florence Green Ridge Windsor Ionia

# **Bates County:**

Drexel Amsterdam Archie Adrian Creighton Urich Appleton City Rockville Butler Rich Hill Hume Foster Pleasanton Amoret

# Henry County:

Creighton Urich Chilhowee Leeton Windsor Calhoun Coal Warsaw Lowry City Deepwater Montrose Appleton City Clinton