

**BEFORE THE PUBLIC SERVICE COMMISSION
OF THE STATE OF MISSOURI**

In the Matter of the Reapplication of)
United Way of Greater Kansas City, Inc.)
f/k/a The Heart of America United Way, Inc.)
for an Order of the Commission Granting it) Case No. _____
Continuing Authority as an Information)
and Referral Provider for purposes of)
211 service)

REAPPLICATION FOR 211 AUTHORITY

Comes now United Way of Greater Kansas City, Inc., f/k/a The Heart of America United Way, Inc. (hereinafter “UWGKC” or “Applicant”), by and through its attorneys, pursuant to 20 CSR 4240-28.015(2) and respectfully submits this reapplication to the Missouri Public Service Commission:

1. Applicant, UWGKC, is a nonprofit corporation organized and existing under the laws of the State of Missouri and as defined by section 501(c)(3). It is the survivor in an Agreement and Plan of Merger between The Heart of America United Way, Inc. (HOA), Bi-County United Way of Cass and Jackson, Inc. (BC), United Way of Johnson County, Inc. (JC) and United Way of Greater Kansas City, Inc. Under the terms of the Agreement and Plan of Merger UWGKC, JC and BC merged into HOA, with HOA surviving as the continuing corporation under a different name, “United Way of Greater Kansas City, Inc.”

2. Attached as Exhibit 1 is a certificate of good standing for UWGKC issued by the Missouri Secretary of State. The merger of the entities did not affect UWGKC’s tax exempt status. A copy of the tax exempt letter issued by the Internal Revenue Service is attached hereto as Exhibit 2. A copy of a confirmation of tax status issued by the Internal Revenue Service is attached as Exhibit 3.

3. Questions or inquiries concerning this Application may be directed to:

Alicia Embley Turner
NEWMAN, COMLEY & RUTH P.C.
601 Monroe Street, Suite 301
P.O. Box 537
Jefferson City, MO 65102-0537
(573) 634-2266 (Tel)
(573) 636-3306 (Fax)
turnera@ncrpc.com

and,

Tony Kline
Chief Operating Officer
United Way of Greater Kansas City, Inc.
801 W 47th Street, Suite 500
Kansas City, MO 64112
(816) 472-4289 (Tel)
(816) 472-6623 (Fax)
tony.kline@uwgkc.org

4. Effective June 18, 2004, UWGKC was authorized by the Commission in Case No. AO-2004-0036 to serve as a Missouri Information and Referral (I&R) Provider for the exchanges listed on Schedule 1 to this Application for a period of three years.

5. On March 16, 2007, Applicant, under its previous legal name, filed an application pursuant to Commission rule 4 CSR 240-32.200 for continuing authority as an I&R Provider for purposes of 211 service. Effective June 18, 2007, in File No. TO-2007-0338, the Commission granted UWGKC's application for continuing authorization to serve as a 211 I&R Provider for another period of three years.

6. On July 29, 2010, Applicant filed an application, pursuant to Commission rule 4 CSR 240-32.200, for continuing authority as an I&R Provider, for purposes of 211 service. Effective January 22, 2011, in File No. AO-2011-0025, the Commission again extended Applicant's authority for three years in the scheduled exchanges.

7. On October 13, 2013, Applicant filed another application, pursuant to Commission rule 4 CSR 240-32.200, for continuing authority as an I&R Provider, for purposes of 211 service. Effective January 13, 2014, in File No. AO-2014-0093, the Commission again extended Applicant's authority for three years in the scheduled exchanges.

8. On August 29, 2016, Applicant filed another application, pursuant to Commission rule 4 CSR 240-28.090, for continuing authority as an I&R Provider, for purposes of 211 service. Effective November 12, 2016, in File No. AO-2017-0059, the Commission again extended Applicant's authority for three years in the scheduled exchanges.

9. On August 12, 2019, Applicant filed another application, pursuant to Commission rule 20 CSR 4240-28.090, for continuing authority as an I&R Provider, for purposes of 211 service. Effective November 12, 2019, in File No. AO-2020-0037, the Commission again extended Applicant's authority for three years in the scheduled exchanges.

10. This reapplication for 211 authority is being filed at least 90 days before the expiration of Applicant's authority as extended. Under Commission Rule 20 CSR 4240-28.015(2) this reapplication is timely.

11. Operating under its continuing authority UWGKC has provided service as an I&R Provider in accord with all applicable Commission rules and Missouri statutes, and wishes to continue as the authorized Missouri I&R Provider in the exchanges herein identified.

Judgments, Annual Reports

12. Applicant does not have any pending action or final unsatisfied judgments or decisions against it from any state or federal agency or court which involves customer service or rates, which action, judgment or decision has occurred within three (3) years of the date of the application.

13. No annual report or assessment fees from the Applicant are overdue.

Monitoring and Personnel

14. Applicant's 2-1-1 telephone line is and will continue to be monitored by trained I&R Specialists 24 hours a day, 365 days per year. All Community Resource Navigators will be Applicant's employees.

15. 2-1-1 calls are answered in order. Callers may wait in queue for the next available Community Resource Navigator. A callback feature is provided if a caller wishes to stay in queue but not to actively wait. This queue will be monitored by the Contact Center Managers to ensure appropriate response time; additional Community Resource Navigators will be made available during crises or peak periods, or when the average wait time is excessive.

Accreditation

16. UWGKC adheres to the current version of the Standards for Professional Information & Referral which were revised by the Alliance of Information and Referral Systems, Inc. (AIRS) in July 2020. UWGKC completed the three phases of AIRS accreditation with a site visit on April 30, 2018. On May 14, 2018 AIRS notified UWGKC that it had passed its site visit and UWGKC received its accreditation valid from November 2011 to May 2023.

17. UWGKC provides comprehensive services pursuant to the AIRS standards. The inquirer has one-to-one human contact with a trained, paid staff Community Resource Navigators who: assesses the needs of the inquirer, identifies appropriate resources, provides appropriate referral(s), helps inquirers for whom services are unavailable by locating alternative resources and, when necessary, actively participates in linking the inquirer to needed services. To illustrate the extent of and reliance upon UWGKC's services, the 2021 Service Snapshot is attached hereto as Exhibit 4 for the Commission's information.

Resource Sharing and Collaboration; Call Tracking

18. UWGKC will share its resource database with other Missouri I&R Providers as they become authorized through its online public searchable database. This database will be actively updated in compliance with AIRS standards.

19. UWGKC has written agreements with specialized information and referral systems such as: AFL-CIO Community Services in St. Joseph, child care resource and referral, Area Agencies on Aging, Missouri State Emergency Management Agency, The Whole Person, KC Common Good, emergency management systems, and Kansas City Missouri 311. As of January 2018, AFL-CIO joined the ServicePoint platform with UWGKC 211 and United Way of Greater St. Louis 211 which expands the capacity of resource database maintenance in the Northwestern counties surrounding the St. Joseph area.

20. UWGKC measures outcomes for operation of the 211 contact center through such means as resource database inquirer, call logs indicating inquirer needs and requests, unmet needs, agencies receiving referrals, inquires by geographic area and zip code, inquirer demographics, and measures through call management software (metrics) performance such as average wait time, average answer time, average hold time, calls abandoned, total call volume, and average call length and call grading for all Community Resource Navigators through the inContact call recording system to monitor protocols and customer service.

21. UWGKC works collaboratively with local United Ways and works collaboratively with United Way of Greater St. Louis, Inc. United Way of Greater St. Louis, Inc. and UWGKC resource staff meet on a regular basis to classify and properly index agencies, programs, and services in the resource database. Both United Way 211s in Kansas City and St. Louis purchased a single shared database that covers all counties of Missouri, nine Illinois

counties, and seven Kansas counties. The database went live in March 2013. Both 211s collaborate on reviewing operational and outcome methods for consistency to assure unified service delivery from both 211s to all residents in this three-state service area.

Inclusion/Exclusion Criteria

22. UWGKC has established and has applied criteria for inclusion and exclusion of human service entities for its database. Those criteria are attached as Exhibit 5.

Information and Referral Database

23. UWGKC maintains a computerized information and referral database that provides updated information and resource data as well as collects caller information. Caller data collection capacity includes: demographic information, age, whether there are children in household 17 years or younger, current employment status, additional sources of income, housing status, veteran status, and the type of call (information, referral, advocacy and crisis) is recorded, type of service request, narrative/notes, start time/duration/end time, referral(s) made, follow-up assignment and outcomes. The ServicePoint database at this writing is currently populated, in conjunction with United Way of Greater St Louis 211, by over 36,000 services. Update solicitation is completed quarterly for one-fourth of the total number of entries.

Other Terms and Provisions

24. The Applicant ensures quality of service and caller and customer satisfaction through follow-up. To improve follow-up procedures, UWGKC initiated a formal follow-up policy and process in March 2007. The policy includes contacting a random selection of at least 2% of those callers who were provided referrals (only callers who volunteer are contacted) and includes inquiring about quality of service provided by the Community Resource Navigator, problem resolution and appropriateness of referral(s). Two measurements are calculated from

follow-up calls to measure outcomes. One is the percentage of callers who followed-up on their referrals and the second is the percentage of callers who were satisfied with the service of UWGKC.

25. UWGKC publicizes the service through a marketing and communications plan which was implemented in March 2006 and updated annually. The plan utilizes a targeted population strategy such that human resources professionals, law enforcement, emergency management, public/private/parochial schools, health and human service agencies, and similar groups or firms are selected for most information campaigns.

26. UWGKC provides Relay services for speech and hearing impaired individuals through 711 and utilizes Stratus for multi-lingual accessibility in 150 languages.

27. Applicant possesses sufficient technical, financial, and managerial resources and abilities to become the I&R Provider for the telephone exchanges within the counties identified in its application. A detailed description of its qualifications in these areas including brief biographies of its key staff is attached as Exhibit 6.

28. Applicant is ready and willing to abide by Commission rules, regulations, and policies; the waiver requested above to apply strictly to this reapplication.

29. Applicant seeks continued authority to serve as a Missouri I&R Provider in the exchanges listed in Schedule 1.

30. Approving UWGKC's reapplication for 211 service is in the public interest.

WHEREFORE, United Way of Greater Kansas City, Inc. respectfully requests the Commission to enter an order granting it renewed authority as a Missouri Information and Referral Provider in the telephone exchanges within the counties described herein, together with such other relief and authority the Commission deems just.

Respectfully submitted,

NEWMAN, COMLEY & RUTH P.C.

By: /s/ Alicia Embley Turner
Alicia Embley Turner #48675
601 Monroe Street, Suite 301
P.O. Box 537
Jefferson City, Missouri 65102-0537
573/634-2266
573/636-3306 FAX
turnera@ncrpc.com

Attorneys for United Way of Greater
Kansas City, Inc.

Certificate of Service

I hereby certify that a true and correct copy of the above and foregoing document was sent via e-mail on this 12th day of August, 2022, to General Counsel's Office at staffcounsel@psc.mo.gov; and Office of Public Counsel at opcservice@ded.mo.gov.

/s/ Alicia Embley Turner

Index of Exhibits

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STATE OF MISSOURI



John R. Ashcroft
Secretary of State

CORPORATION DIVISION
CERTIFICATE OF GOOD STANDING

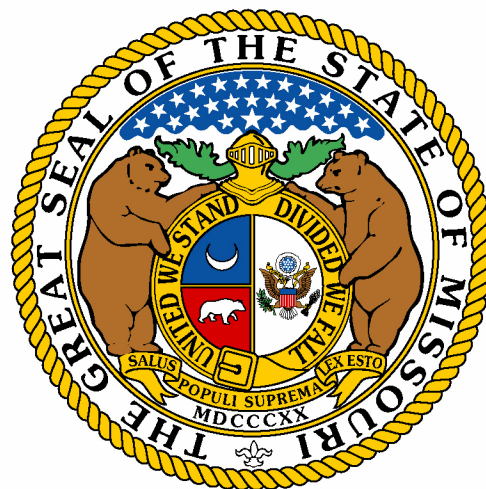
I, JOHN R. ASHCROFT, Secretary of State of the State of Missouri, do hereby certify that the records in my office and in my care and custody reveal that

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 12th day of August, 2022.


Secretary of State



Certification Number: CERT-08122022-0009

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.

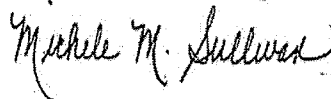
In December 1947 we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

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

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

Date: ~~Aug~~ 30 2007

United Way of Greater Kansas City, Inc.
1080 Washington St
Kansas City, MO 64105-2216

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

2021 Snapshot - United Way of Greater Kansas City 211 Annual Calls & Needs Report

	2020	2021
Total Contacts	194,781	233,785
Total Local Contacts	139,571	192,824
Queue Calls	75,699	103,024
Non-Queue Contacts	266	341
Emails	664	110
Web Visits	62,942	89,349
Total Contract Calls	55,210	40,961

211 provides free, confidential access to community resources 24/7. This is a snapshot of voluntary data collected, intended to show trends in community needs. For more information, call 211 or visit www.211kc.org.



Need Outcome	Count	%
Met	83,853	89.26%
Unmet	10,078	10.73%
	10	0.01%
Total Needs:	93,941	

Top Counties	Calls	%
Jackson	54,959	70.65%
Clay	6,321	8.13%
Wyandotte	5,740	7.38%
Johnson	5,324	6.84%
Platte	1,970	2.53%
Buchanan	1,303	1.68%
Cass	1,159	1.49%
Leavenworth	513	0.66%
Pettis	289	0.37%
Henry	210	0.27%

Callers by Age	Calls	%
Child 0-17	75	0.17%
Adult 18-39	17,658	39.29%
Adult 40-59	16,829	37.44%
Senior 60+	10,386	23.11%

Employment Status	Calls	%
Employed Full Time	10,973	23.63%
Employed Part Time	5,414	11.66%
Retired	3,830	8.25%
Unemployed	26,220	56.46%

Veteran/Military	Calls	%
US Military	176	0.36%
US Veteran	2,502	5.09%
Neither	46,514	94.56%

Housing Situation	Calls	%
Housed	41,829	78.91%
At Risk of Homelessness	4,255	8.03%
Homeless	6,925	13.06%

Kids in Household	Calls	%
Yes	20,469	41.27%
No	29,131	58.73%

Top Needs	Total Needs	Unmet #	Unmet %
1 Electric Service Payment Assistance	20,549	993	4.83%
2 Rent Payment Assistance	10,920	582	5.33%
3 Gas Service Payment Assistance	6,716	378	5.63%
4 Water Service Payment Assistance	5,834	283	4.85%
5 Community Shelters	4,403	970	22.03%
6 Food Pantries	2,656	139	5.23%
7 Tax Preparation Assistance	2,491	330	13.25%
8 Low Cost Home Rental Listings	2,183	55	2.52%
9 Transitional Housing/Shelter	1,616	132	8.17%
10 Rental Deposit Assistance	1,589	200	12.59%
11 Housing Related Coordinated Entry	1,443	56	3.88%
12 Homeless Motel Vouchers	1,379	1,269	92.02%
13 Ride App Services	1,004	144	14.34%
14 Holiday Gifts/Toys	853	109	12.78%
15 Domestic Violence Shelters	797	71	8.91%
16 311 Services	731	10	1.37%
17 Mortgage Payment Assistance	612	87	14.22%
18 Food Stamps/SNAP Applications	549	13	2.37%
19 Home Rehabilitation Programs	545	23	4.22%
20 General Clothing Provision	537	26	4.84%

Top Referrals	Call Count
1 Metro Lutheran Ministry - Central - Emergency Assistance	10,874
2 Bishop Sullivan Center - Troost - Emergency Assistance	6,563
3 Mid-America Assistance Coalition - LIHEAP	6,367
4 Redemptorist - Utility Assistance	5,877
5 Emergency Rental Assistance Program - Kansas City, MO	4,157
6 Catholic Charities KCSJ - Emergency Assistance	3,836
7 Bishop Sullivan Center - Truman Road - Emergency Assistance	3,276
8 Missouri State Assistance for Housing Relief (SAFHR)	3,188
8 Salvation Army - Blue Valley	3,188
10 Metro Lutheran Ministry - Northland - Emergency Assistance	2,819
11 Community Assistance Council - Utility And Rent Assistance	2,793
12 True Light Family Resource Center	2,679
13 Salvation Army - Grandview	2,580
14 Salvation Army - Northland	2,501
15 Salvation Army - Westport - Emergency Assistance	2,387
16 Salvation Army - Eastside - Emergency Assistance	2,326
17 reStart - Emergency Shelter & Transitional Housing	2,090
18 VITA - Free Tax Preparation Registration 2021	2,077
19 Redemptorist - Rent Assistance	2,075
20 Northland Assistance Center	1,957

United Way 211/United Way of Greater Kansas City Database Inclusion/Exclusion Criteria

United Way 211 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 211.

Requirements for Inclusion:

- 1) The agency/service provider must provide a human service to the public that can be referred to by 211; 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 211 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 211 (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)
- Individual advocacy organizations related to health and human service issues (Centers for Independent Living, Area Agencies on Aging)
- Self-help support groups (local, state, regional, national)
- Licensed for-profit and non-for-profit hospitals
- Nonprofit adult day services
- 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 nonprofit organizations
- Consumer protection resources and basic business assistance services that are government designated/contracted or nonprofit
- Educational resources, including schools for special needs

- National organizations serving residents in the United Way 211 coverage region
- 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 needed social service that is not easily accessible in the public-non-profit sector (such as paternity testing)
- 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, disability, 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 control 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 social service, and the worship services of included faith organizations
- 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 211.
- Exclusion does not reflect on any organization's contribution to the community.
- United Way 211 may reserve the right to review an organization/program/service for inclusion or exclusion 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, number of referrals by 211 Contact Center, etc.
- ***Inclusion/Exclusion Criteria will be reviewed at least once every year to ensure that the resource database is addressing the changing needs of the community.

Disaster-Specific Inclusion/Exclusion:

During a disaster, 211 management reserves the right to set Inclusion/Exclusion criteria based on community needs and scope of the disaster. This might include for-profits that do not meet above criteria for the duration of the response and recovery.

- 211 will consider for inclusion services, donation needs and volunteer opportunities identified and verified by Missouri Voluntary Organizations Active in Disasters (VOAD) partners.
- Agencies must have resources to meet the need of 5% or greater of the mass population effected by the disaster.
- Offerings of services from individuals will not be included.
- 211 reserves the right to exclude any service that cannot be verified.

Technical Competency:

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

WellSky f/k/a Bowman ServicePoint is an internet-based SaaS application that provides ease and flexible methods in accessing the 211 database. ServicePoint information and referral software has been operational since March 2013 and aligns UWGKC to be fully compliant with Alliance of Information and Referral Systems (AIRS) standards required for information and referral service accreditation. The ServicePoint software is supported through contract with its developer WellSky. Staff can utilize the flexibility of the application to make customizations as needed.

As of March 2020, 211 staff work remotely using NICE inContact cloud-based VoIP phone system, specially configured laptops for remote operation, and additional emergency disaster protocol are in place to reduce 211 service disruptions. The VoIP system has proved its worth by providing a high level of call queue handling and manageability, ensuring quality of service. Management also has remote capabilities and maintain oversight of contact center performance to ensure continuity of services.

The ServicePoint application allows the appropriate staff the capability to review historical data for reporting and trends. Through NICE inContact, UWGKC tracks all call recordings for a period of 60 days for quality assurance and monitoring purposes.

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 \$28,104,801. UWGKC has a financial staff of five full-time individuals dedicated to complete and accurate financial management. UWGKC utilizes an accrual accounting method in line with Generally Accepted Accounting Principles (GAAP). UWGKC is audited on an annual basis by an independent firm 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:

Vice President, Community Impact & Executive Director, 211, Todd Jordan, recently transitioned into the role of Executive Director, 211 though has served in executive leadership roles with United Way of Greater Kansas City in addition to serving as the President/CEO of United Way of Wyandotte prior to the merger with United Way of Greater Kansas City in 2020.

Director, Kristen Womack, has worked for United Way 211 since 2014 and has 6 years of management experience. In addition to this experience, she 3 additional years of previous non-profit experience serving survivors of domestic violence, veterans and active service members, as well as unhoused individuals and families. She also has over 12 years of customer service experience. Kristen is an AIRS Certification for Community Resource Specialist (CRS) through the Alliance of Information and Referral Systems (AIRS). She received a MA in Marriage and Family Therapy which has been utilized in her current position to help improve quality assurance, customer experience, and provide coaching to the

team members. She has completed the Certified Call Center Managers Course through the Resource Center for Customer Service Professionals in 2018.

Daytime Contact Center Manager, Lenetta Warren, has almost 5 years of management experience. She has worked for several call centers and held lead positions with each. During her call center experience, she worked for the Department of Treasury in the Identity Theft and Accounts Management departments for 3 years. She has also worked in the social services field where she worked for the Children's Division for 4 years. These skills and experience have been utilized in her current role to help provide coaching and training of the Community Resource Navigators. Since her time with UWGKC, she has been able to obtain her AIRS Certification for Community Resource Specialist (CRS).

Afterhours Contact Center Manager, Brian Shapley, has three years of management experience at UWGKC 211 in addition to 12 years of previous contact center experience including 5 years of lead and/or trainer-level positions. He also came to the role with four additional years of non-profit management experience serving as a District Executive with Boy Scouts of America for a four-county region in central Missouri. Brian also has a bachelor's degree in Non-Profit Management.

Resource Center Manager, Callie Knust, has 7 years of experience in development and maintenance of the UWGKC 211 resource database; two of those years has been serving as the Resource Center Manager. In addition, she is an AIRS Certification for Community Resource Specialist - Database Curator (CRS - DC). Callie Knust, with a bachelor's in social work, came to the role with social work and non-profit experience including serving at a domestic violence center.

Additionally, United Way 211 currently has a total of 18 full-time and 14 part-time staff of whom 8 are AIRS certified. Of those, 26 are Community Resource Navigators, including 2 Senior Community Resource Navigators. Additional roles include 1 full-time Resource Specialists (AIRS Certified) and 1 full-time Quality Assurance & Training Coordinator. Most of the staff members have direct work experience in health and human service agencies. All staff 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. UWGKC will be hosting an AIRS certification exam this fall to allow all eligible non-certified staff to complete the exam requirements. Currently 50% of the eligible staff of United Way 211 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
Graham
Barnard

Jackson County:

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