

**Technical Competency:**

United Way of Greater Kansas City (UWGKC) maintains technical competence to operate United Way 2-1-1. The organizational computer server LAN/WAN network has been updated to include the latest IBM hardware; running the most recent Microsoft operating systems, including both Windows XP and 2007 server. In addition, Office 2007 is used to improve workflow within UWGKC offices. Cisco network devices are in place. UWGKC has implemented a Sonic WALL firewall, and is using the latest in intrusion prevention devices.

In March, 2004, UWGKC installed a Sprint Coral telephone system which is digital and IP capable for QOS as well as positioning the system for implementation of VOIP, call center management, and for the use of soft phones at the desktops of Information and Referral Call Specialists.

In October 2009, UWGKC installed a sophisticated call recording and monitoring system; OAYSIS, recording all United Way 2-1-1 calls for quality assurance purposes.

IRis 3.0 upgraded information and referral software has been operational since summer 2003; and aligns UWGKC to be fully compliant with Alliance of Information and Referral Systems (AIRS) standards required for call center certification. The IRis software is supported through contract with its developer Suncoast Systems and Bowman Systems and by an UWGKC IT staff of three.

**Financial Competency:**

As more particularly described in the Reapplication, in 2007, Heart of America United Way (including Northland United Way Services), Bi-County United Way, and United Way of Johnson County effectively merged into one organization, the United Way of Greater Kansas City (UWGKC).

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 \$31 million with program services and distributions nearly \$27 million.

UWGKC has a financial staff of six 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 of United Way 2-1-1 Scott Jones has 18 years of corporate customer service experience in an electric utility company, including 8 years in a high call volume 24 hour customer service center. Scott Jones also has 15 years experience in management and supervision in both the corporate sector and non-profit organizations. Scott Jones also has 1 ½ years experience serving as a mental health case manager, working with adults with serious and persistent mental illness.

Senior Call Specialist Patt Harvey has 31 years of experience in I&R and is an AIRS Certified Information and Referral Specialist; with additional expertise in resource data management, resource data research, and community organizing.

Call Center Supervisor (former Resource Data Specialist) Jennifer Miller has 6 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 been cross-trained to serve as an I&R call specialist, and has completed a course in Spanish for social service agency intake workers. Jennifer Miller was promoted to Call Center Supervisor on January 1, 2010.

United Way 2-1-1 is currently staffed by 2 full time Call Specialists; both of whom are AIRS certified; 17 part time Call Specialists of whom 5 are AIRS certified; 1 full time Quality Resource Specialist, 1 part time Quality Assurance Specialist and 1 full time Health Care Advocate who is AIRS certified. 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 one complete year of employment with a HS diploma or GED, 2 years with a Community College degree and 3 years with a Bachelors degree or higher degree. Currently 64% of the eligible staff of United Way 2-1-1 are AIRS certified. AIRS requires 25 % of eligible staff to be certified.