

**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. On July 1, 2020, United Way of Wyandotte County, Inc. merged into UWGKC, with UWGKC as the surviving entity.

3. 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.

4. 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,

Ann Gaffigan
Chief Operating and Financial Officer
United Way of Greater Kansas City, Inc.
801 W 47th Street, Suite 500
Kansas City, MO 64112
(816) 831-3827 (Tel)
ann.gaffigan@uwgkc.org

5. 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.

6. 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.

7. 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.

8. 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.

9. 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.

10. On August 12, 2019, Applicant filed another application, pursuant to Commission rule 4 CSR 240-28.015, 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.

11. On August 12, 2022, Applicant filed another application, pursuant to Commission rule 20 CSR 4240-28.015(2), for continuing authority as an I&R Provider, for purposes of 211 service. Effective November 12, 2022, in File No. AO-2023-0069, the Commission again extended Applicant's authority for three years in the scheduled exchanges.

12. 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.

13. 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

14. 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.

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

Monitoring and Personnel

16. 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. Effective July 2025, contact center operations are monitored by Community Resource Specialists, who are UWGKC employees, Monday through Friday from 7am to 7pm. Contact center operations are monitored by contracted third parties before and after those hours and on holidays. The contracted third parties are trained in I&R best practices and certified as Certified Community Resource Specialists through Inform USA, I&R accreditation body.

17. 2-1-1 calls are answered in order. Callers may wait in queue for the next available Community Resource Specialist. 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 and answered in order; additional Community Resource Specialists will be made available during crises or peak periods, or when the average wait time is excessive.

Accreditation

18. UWGKC adheres to the current version of the Standards for Professional Information & Referral which were revised by the Inform USA, also known as Alliance of

Information and Referral Systems, Inc., in July 2024. UWGKC completed its third five-phase process of Inform USA accreditation with a site visit on December 7 and 8, 2023. On December 11, 2023 Inform USA notified UWGKC that it had passed its site visit and UWGKC received its accreditation valid from May 2023 to May 2028.

19. UWGKC provides comprehensive services pursuant to the Inform USA standards. The inquirer has one-to-one human contact with a trained, paid staff Community Resource Specialists 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 2024 Annual Report is attached hereto as Exhibit 4 for the Commission's information.

Resource Sharing and Collaboration; Call Tracking

20. 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 Inform USA standards.

21. UWGKC has written agreements with specialized information and referral systems such as: AFL-CIO Community Services in St. Joseph, mental health crisis lines, Mid America Regional Council Aging and Adult Services, Missouri State Emergency Management Agency, emergency management systems, and City of Kansas City Missouri. As of January 2018, AFL-CIO joined the WellSky Community Services 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.

22. 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 Specialists through the inContact call recording system to monitor protocols and customer service.

23. 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 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, sixteen 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 ensure unified service delivery from both 211s to all residents in this three-state service area.

Inclusion/Exclusion Criteria

24. 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

25. 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, family caregiver status, and transportation access. Additionally,

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 WellSky Community Services database at this writing is currently populated, in conjunction with United Way of Greater St Louis 211 and AFL-CIO of St Joseph, by over 39,950 services. Update solicitation is completed quarterly for one-fourth of the total number of entries.

Other Terms and Provisions

26. 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. In August 2025, UWGKC launched a SMS-text based follow up service in conjunction with the call-based service. At that time, the policy was updated to follow up with 100% of SMS-based follow up requests and 7% of those callers who request call-based follow-up and were provided referrals (only callers who volunteer are contacted). The process includes inquiring about quality of service provided by the Community Resource Specialist, quality of referred services after successful connection, 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.

27. 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. In recent years, a social media

campaign has also been launched to increase awareness of 211 services and impacts.

28. UWGKC provides Relay services for speech and hearing-impaired individuals through 7-1-1 and utilizes AMN Language Service, also known as Stratus, for multi-lingual accessibility in 200 languages.

29. 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.

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

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

32. 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 11th day of August, 2025, 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

Exhibit 1	Certificate of Good Standing
Exhibit 2	Tax Exempt Letter
Exhibit 3	Confirmation of Tax Status
Exhibit 4	2024 211 Annual Report
Exhibit 5	Database Inclusion/Exclusion Criteria
Exhibit 6	Qualification Description
Schedule 1	List of Exchanges

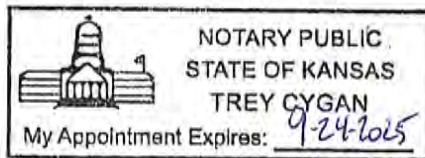
VERIFICATION

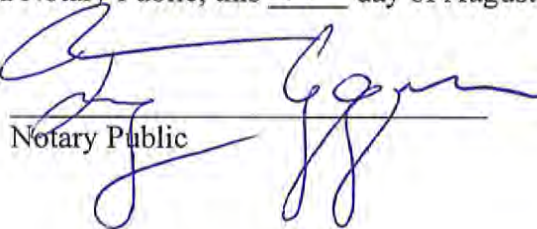
STATE OF ^{Kansas}MISSOURI)
COUNTY OF ^{Johnson}JACKSON) ss.

I, Todd Jordan, being first duly sworn upon oath, do hereby depose and state that I am Vice President, Community Impact and Executive Director, 211 of United Way of Greater Kansas City, Applicant in this proceeding; and am authorized to execute this verification; that I have read the above and foregoing reapplication and know the contents thereof; that the contents are true in substance and in fact, except as those matters which are stated upon information and belief, and as to those, I believe the same to be true.


Todd Jordan

Subscribed and sworn to before me, a Notary Public, this 11th day of August, 2025.




Notary Public

STATE OF MISSOURI



Denny Hoskins
Secretary of State

CORPORATION DIVISION
CERTIFICATE OF GOOD STANDING

I, DENNY HOSKINS, 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 6th day of August, 2025.

Denny Hoskins
Secretary of State

Certification Number: CERT-08062025-0152

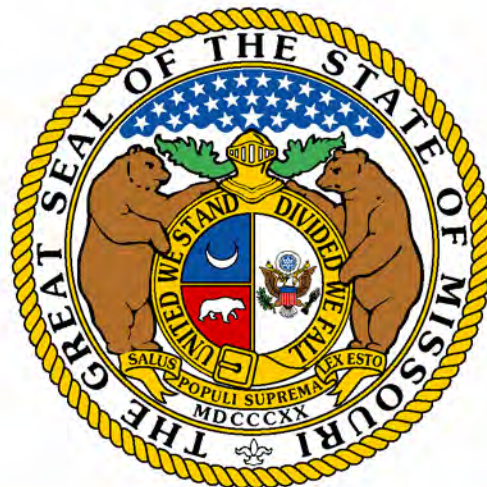


EXHIBIT 1

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.

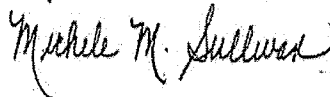
In December 1947 we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

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

EXHIBIT 2

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

EXHIBIT 3



211

Get Connected. Get Help.™

ANNUAL REPORT

2024

United Way 211: Answering our Community's Call

The only nationally accredited information and referral service in our region.

Free and confidential.

Available 24 hours a day, 365 days a year.

Each call is answered by trained Community Resource Navigators who navigate a database of 7,000+ services.



UNITED WAY
Greater Kansas City

211

Get Connected. Get Help.™

EXHIBIT 4

A MESSAGE FROM OUR 211 EXECUTIVE DIRECTOR

Now more than ever, our friends, neighbors and colleagues turn to United Way 211 for assistance.

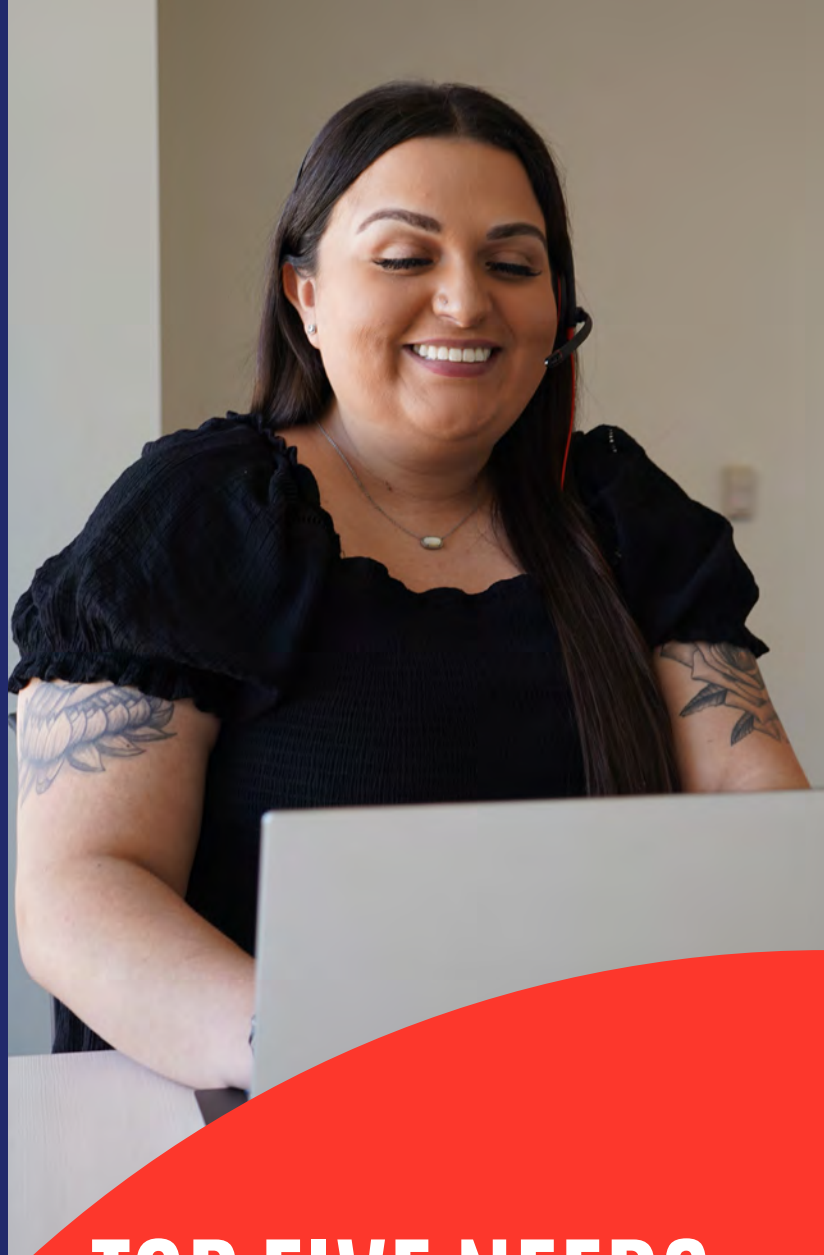
Beyond the fundamental information and referral services our team provides every day, 211 is often the front door for people in unique situations needing help. For example, our 211 serves as the call center for Mid-America Regional Council's Aging and Adult Services, providing information/referrals, as well as advocacy for more than 12,000 older adult callers last year. Transportation is a significant challenge for many people in our metropolitan area. In partnership with United Way Worldwide and Lyft, our 211 was able to provide nearly 3,000 rides to individuals trying to get to work, healthcare, or other critical needs.

211 also works to support the stability of households in our metro. In Kansas City, Missouri, the 211 team is the contact center for applying for the KCMO Right to Counsel program where people who are facing eviction get access to free legal services as they navigate their housing crisis. In 2024, 211 handled almost 2,000 calls as part of this work. 211 also handles contact and scheduling for Volunteer Income Tax Assistance (VITA) sites across the metro. Last year, 211 received more than 4,200 calls for this service and helped connect low to moderate income households to free tax assistance programs which allow households to access credits, refunds, and financial education.

We're proud that we not only provide help to people across Kansas City, but that we do it with the highest standards in the Information and Referral (I&R) industry as our team is nationally accredited by Inform USA, the gold standard for I&R agencies. 211 plays an instrumental role in connecting our community to programs and services while driving United Way's mission forward as an ecosystem coordinator. By reducing barriers, creating partnerships and innovating to meet community needs, 211 makes Kansas City a place where all can thrive. On behalf of the entire 211 team, I want to thank all our Waymakers™ whose dedication to United Way makes our work possible!



DR. TODD JORDAN, PhD
Vice President of Community Impact
and 211 Executive Director



TOP FIVE NEEDS

30% UTILITY ASSISTANCE

17% HOUSING STABILITY

11% UNHOUSED SERVICES

7% NEW HOUSING NEEDS

5% TRANSPORTATION

CONTACT DEMOGRAPHICS

PLATTE COUNTY

2,191 contacts
2.6%

CLAY COUNTY

6,649 contacts
7.8%

WYANDOTTE COUNTY

6,445 contacts
7.5%

JACKSON COUNTY

59,801 contacts
69.9%

JOHNSON COUNTY

4,791 contacts
5.6%

CASS COUNTY

1,359 contacts
1.6%

*Remainder of contacts received are from the 23-county region served by United Way of Greater Kansas City's 211 operation.

476,691

Total 211 contacts in 2024

(combination of phone calls, emails, and unique website visits to 211kc.org)

Which is a

33% INCREASE

from 2023

155,045

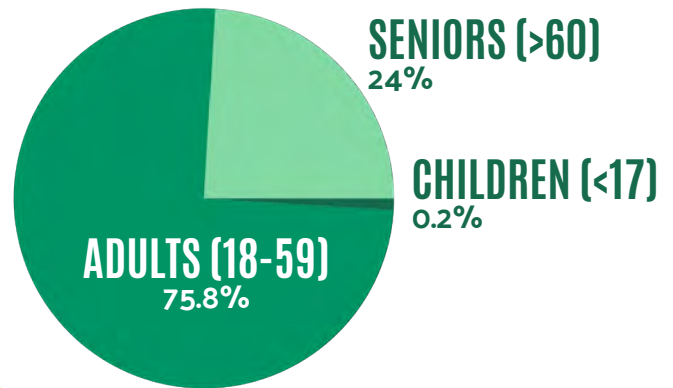
Total calls answered in 2024

91%

of needs met

135%

Increase in contacts
from 2019-2024



TOP REFERRAL PROGRAMS



MY
**FREE
TAXES**



SUPPORT 211

When each of us do our small part, we make a difference for **1 in 3 Kansas Citians** who rely on us.

Learn more about the work of United Way of Greater Kansas City in your community and give to ensure these vital services can continue at unitedwaygkc.org/donate or scan this QR code:



RIDE UNITED

In partnership with Lyft, this program works to fill the unmet needs gap for transportation assistance. United Way 211 scheduled transportation to appointments, services, and organizations at no charge.

TOTAL REFERRALS: 2,592

TOP TRANSIT NEEDS:

Employment - 1294

Healthcare - 495

Food - 272

Education - 168

Housing - 94

Legal Services - 49

Economic stability - 41

MOST UTILIZED LANGUAGES

English, Spanish,
Bosnian, Vietnamese,
Arabic & more

STAY UP TO DATE WITH UNITED WAY:

Follow us on socials @UnitedWayGKC and subscribe to our newsletters at www.unitedwaygkc.org.





DATABASE INCLUSION CRITERIA

United Way of Greater Kansas City 211 follows the standard practices established by our accrediting body, Inform USA, 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

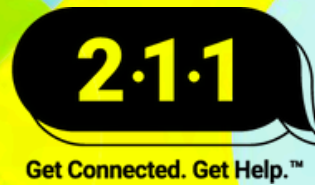
The activities of human services professionals which help people become more self-sufficient, sustain independence, strengthen family relationships, support personal and social development and ensure the well-being of individuals, families, groups and communities. Specific human services include ensuring 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.

EXHIBIT 5

UNITED WAY OF GREATER KANSAS CITY

801 W. 47TH STREET, SUITE 500 | KANSAS CITY, MO 64112 | 816-472-4289 | UNITEDWAYKC.ORG



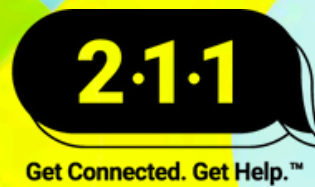
- 2) The agency/service provider must serve the residents of the United Way 2-1-1 23 county coverage region.
- 3) The agency/service provider may be either government or non-profit 501-(C) 3. For-profit organizations and unincorporated groups meeting critical human service needs which are not covered 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)
- 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

UNITED WAY OF GREATER KANSAS CITY

801 W. 47TH STREET, SUITE 500 | KANSAS CITY, MO 64112 | 816-472-4289 | UNITEDWAYKC.ORG



Inclusion Examples (continued):

- 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 2-1-1 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 race, ethnicity, age, gender or gender identity, 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
- Faith-based organizations that don't offer a social service, and the worship services of included faith organizations

UNITED WAY OF GREATER KANSAS CITY

801 W. 47TH STREET, SUITE 500 | KANSAS CITY, MO 64112 | 816-472-4289 | UNITEDWAYKC.ORG



Exclusion Examples (continued):

- 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
- Head Starts
- Public school districts unless they have programming for the public outside of schooling
- Medical research studies, regardless of the provider
- 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.

UNITED WAY OF GREATER KANSAS CITY

801 W. 47TH STREET, SUITE 500 | KANSAS CITY, MO 64112 | 816-472-4289 | UNITEDWAYKC.ORG



Disclaimer (continued):

- 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 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, number of requests for certain services from our 211 callers, 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 and Kansas Voluntary Organizations Active in Disasters (VOAD).
- Agencies' resources must meet the need of 5% or greater of the mass population affected by the disaster.
- Offerings of services from individuals will not be included.
- 211 reserves the right to exclude any service that cannot be verified.

Last Reviewed 12-19-2023

UNITED WAY OF GREATER KANSAS CITY

801 W. 47TH STREET, SUITE 500 | KANSAS CITY, MO 64112 | 816-472-4289 | UNITEDWAYKC.ORG

United Way of Greater Kansas City

Technical Competency:

United Way of Greater Kansas City (UWGKC) maintains the technical competence to operate United Way 211 services and UWGKC has internal technical support and expertise through the supervision of the Vice President, Information Technology.

WellSky Community Services f/k/a Bowman ServicePoint is an internet-based SaaS application that provides ease and flexible methods in accessing and maintaining the 211 database.

WellSky Community Services software has been operational since March 2013 and aligns UWGKC to be fully compliant with Inform USA, formerly known as the Alliance of Information and Referral Systems (AIRS), standards required for information and referral service accreditation. The 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 CXone inContact cloud-based VoIP phone system, specially configured laptops for remote operation, and additional emergency disaster protocols 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, integrated quality of service assessment tools, live call-center dashboards, and robust reporting capabilities. Management also has remote capabilities and maintain oversight of contact center performance to ensure continuity of services.

The WellSky Community Services 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 23 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 \$ 29,309,605. UWGKC has a financial staff of 7FTE 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:

Todd Jordan, PhD serves as the Vice President, Community Impact & Executive Director, 211, bringing over a decade of experience guiding United Way initiatives in the Kansas City area. He

provides executive oversight for 211 and leads its integration with the broader network of United Way programs and partners.

The Vice President, 211, Kristen Engelbrecht, has been with United Way since 2014 and brings over 9 years of leadership experience within the organization. She also has 3 years of prior non-profit experience supporting survivors of domestic violence, veterans, active service members, and individuals experiencing homelessness. With more than 22 years of customer service experience, she has consistently demonstrated a strong commitment to quality and community impact. She holds a Community Resource Specialist (CRS) certification through Inform USA and completed the Certified Call Center Manager Course through the Resource Center for Customer Service Professionals in 2018. Her academic background includes a Master's degree in Marriage and Family Therapy, which she leverages to enhance team coaching, customer experience, and quality assurance practices within 211 operations.

Contact Center Manager, Lenetta Warren, brings nearly 8 years of management experience and a strong background in call center operations. She has held leadership roles across multiple contact centers, including three years with the U.S. Department of the Treasury in the Identity Theft and Accounts Management departments. In addition, she has four years of experience in the social services sector with the Children's Division. Her combined expertise supports her current responsibilities in coaching and training Community Resource Specialists. She holds a Community Resource Specialist (CRS) certification through Inform USA and completed the Certified Call Center Manager Course through the Resource Center for Customer Service Professionals in 2025.

Contact Center Manager, Brian Shapley, has 6 years of management experience with United Way 211 and 15 years of contact center experience, including 10 years in lead and trainer-level roles. He also has 4 years of non-profit management experience as a District Executive with the Boy Scouts of America, serving a four-county region in central Missouri. He holds a bachelor's degree in Non-Profit Management, which supports his leadership in operations, staff development, and community engagement within the 211 Contact Center. He holds a Community Resource Specialist (CRS) certification through Inform USA and and Certified Call Center Manager Certification through the Resource Center for Customer Service Professionals.

The Resource Center Manager, Callie Knust, brings 10 years of experience in the development and maintenance of the United Way 211 resource database, including 5 years in her current leadership role. She holds the Inform USA Community Resource Specialist – Database Curator (CRS-DC) certification and has a strong foundation in social work, supported by a bachelor's degree in the field. Prior to joining 211, she gained valuable experience in the non-profit sector, including work at a domestic violence center. Her combined expertise supports the accuracy, integrity, and accessibility of the 211 resource database.

The Quality Assurance & Training Manager, Ayannah Taylor, has been with United Way 211 since 2019, bringing a strong background in training, customer service, and contact center operations. She has over 3 years of prior training experience, 2 years of quality assurance

experience, and has worked in customer service and call centers since 2015. In her current role, she oversees quality assurance processes and staff training from onboarding to annual training plans for the frontline specialists to support service excellence and professional development. She holds the Inform USA Community Resource Specialist (CRS) certification, reinforcing her commitment to I&R standards and continuous improvement.

Additionally, United Way 211 currently has a total of 20 full-time and 7 part-time staff of whom 16 are Inform USA certified. Inform USA requires 25% of eligible staff to be certified. Staff make-up includes 19 Community Resource Specialist positions. Additional roles include 3 full-time Aging Intake Specialists, 2 full-time Resource Specialists, and 1 part-time Quality Assurance Specialist. Majority of the staff members have direct work experience in health and human service agencies. All staff are eligible to test for Inform USA 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 or higher degree.

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

Saline County:

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

Bates County:

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

Johnson County:

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

Pettis County:

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

Henry County:

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