



United Way 2-1-1
of the
Peninsulas

Business Plan

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United Way 2-1-1 of the Peninsulas

A Partnership among United Way of Kitsap County,
United Way of Clallam County and
United Good Neighbors of Jefferson County

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Mission, Vision, Values

Mission Statement

United Way 2-1-1 of the Peninsulas exists to provide a comprehensive integrated health and human services information and referral network for residents of the Kitsap and Olympic Peninsulas as part of WIN 2-1-1 and the national 2-1-1 initiative.

Vision

United Way 2-1-1 of the Peninsulas will be the exceptional resource of choice for those in need of health and human services information and referral.

Values

United Way 2-1-1 of the Peninsulas embraces these values:

- ☎ Inclusion and respect
- ☎ Compassion for the vulnerable and less fortunate
- ☎ Collaboration within the community and beyond
- ☎ Commitment to excellence
- ☎ Continuous quality improvement

The Value of United Way 2-1-1 of the Peninsulas

A Three-Digit Regional Dialing Code for Accessing Critical Health and Human Service Information

Within our region and throughout the nation, the health and human services network is often complex and difficult to navigate. Every minute of every hour, someone in the United States needs essential services – from locating licensed child care to finding emergency shelter or securing care for a homebound senior. In many cases, people don't know where to turn. They may be new to the area or may have never needed to seek assistance in the past. A national effort promises to make access easier through the use of a nationally-approved telephone number: **2-1-1**.

The Pacific Northwest, and particularly parts of the Kitsap and Olympic Peninsulas, has been one of the economically hardest hit regions in the country – from the decline in the technology sector to cutbacks in the salmon and timber industries and Department of Defense downsizing. Although Washington dropped from number 5 in the nation to 10 in the national rankings for food and hunger in 2004, nearly 100,000 households remain food insecure and hungry.¹ Kitsap and Clallam Counties exceeded the national unemployment rate in June 2005, at 5.5 percent and 6.1 percent respectively. Jefferson County, which was listed along with 15 other Washington counties as a distressed area² in 2004, was two-tenths of a percentage point more the national average and three-tenths of a percentage point less than the state average in June 2005.

To better address the needs of vulnerable individuals, children, seniors and families, United Way InfoLink of the Peninsulas – a dynamic information and referral network that serves the Kitsap and Olympic Peninsulas – was started in 1998. At its inception, InfoLink was developed as a collaborative project among United Way of Kitsap County, Kitsap Mental Health Services, Harrison Hospital, Kitsap Physicians' Service, Bremerton-Kitsap County Health District and Kitsap Community Network. In recent years United Way of Clallam County joined as a partner in the project. United Good Neighbors of Jefferson County is committed to being a full partner in January 2006. At the present time, InfoLink is preparing to enhance its existing information and referral through the use of the abbreviated dialing code 2-1-1 to improve access to health and human services in Kitsap, Clallam and Jefferson Counties. By combining this new- easy-to-remember access number with improved technology and telephony and increased staff, the InfoLink line will be more efficient and responsive than ever and will be an integral part of the Washington Information Network (WIN 2-1-1). At a time when budget cuts have resulted in reduced services, 2-1-1 of the Peninsulas will help fill the information gap and will provide a cost effective, efficient way to connect people with the services that are available.

¹ Healthy Mothers, Healthy Babies Coalition of Washington State, www.hmhbwa.org/forprof/education/hunger

² A distressed area is described by the Washington State Employment Security Department Labor Market and Economic Analysis Branch as a county with a 3-year average unemployment rate equal to or greater than 120 percent of the statewide unemployment rate.

2-1-1 is a three-digit dialing code that was assigned in July 2000 by the Federal Communications Commission for the exclusive purpose of providing widespread access to community information and referral services. Described as “elegant in its simplicity,” 2-1-1 is the national solution to navigating the maze of health and human services. This easy-to-remember number links callers needing services to the available health and human services in their area. Currently, there are 169 active 2-1-1 systems in all or part of 32 states plus Washington, D.C. and Puerto Rico, serving over 46 percent of the United States’ population. These systems operate as a critical part of the health and human service delivery system utilizing skilled professionals to assess callers’ needs, determine their options and best course of action, direct them to appropriate programs/services, provide culturally appropriate support, intervene in crisis situations, and advocate for the caller as necessary.

However, a 2-1-1 system is more than just a three-digit dialing code – 2-1-1 is an opportunity for the nation to build a standardized, high quality communication and information dissemination system. It is an opportunity to build an integrated system of service. The sharing of information, whether over the phone, in persons, or through the web is a critical component of the human service system. All programs will benefit from the shared infrastructure of the 2-1-1 system.

2-1-1 is not a duplication of services; it will not replace or duplicate services provided by other specialized information and referral networks, such as Senior Information and Assistance, Child Care Resource and Referral, domestic violence hotlines, or other social service providers. It is an opportunity to build an integrated system of services by developing new partnerships and expanding others, thereby strengthening the human service system. The shared infrastructure service of the 2-1-1 system is expected to benefit all health and human service providers. In addition, 2-1-1 will offload from 9-1-1 the many non-emergent but critical calls for help, allowing 9-1-1 to dedicate its time exclusively to emergency response functions.

Now, more than ever, individuals and families need a way to efficiently access community resources to achieve or maintain self-sufficiency. If United Way 2-1-1 of the Peninsulas is to realize its vision, every individual throughout the Kitsap and Olympic Peninsulas will have access to 2-1-1, and the information that can help them lead healthier and more secure and productive lives.

Executive Summary

What is Information and Referral?

Information and referral (I & R) gives people in need an easy link to information about local resources. It is the link between all community resources and all residents. From the single mother in dire need of food for her children to the senior citizen looking for in-home care or the homeless family seeking housing, information and referral brings people and services together. Information and referral also serves as a contact point in the community for citizens to give help as donors or volunteers. Currently, information and referral is available through a complex system of comprehensive information and referral programs, (i.e., InfoLink), specialized information and referral programs (i.e., Senior Information and Assistance), and case managers and staff of agencies serving our communities (i.e., Washington Division of Social and Health Services or local community action agencies).

What is 2-1-1?

2-1-1 is a nationally recognized three-digit dialing code that provides access for individuals at all life stages, particularly those in transition or change, or those who may need to call on the safety net of social services. The United Way of America and the Alliance of Information and Referral Systems (AIRS) are leading the way in the implementation of 2-1-1, an efficient solution that eliminates the confusing maze of information and services that often overwhelms individuals who need help. 2-1-1 offers information for service providers looking for information for their clients and organizations dedicated to providing social assistance a means to enhance their impact and maximize scarce resources. 2-1-1 can serve as an intake mechanism for people who want to give back to their community through volunteerism or donations and financial contributions.

What is WIN 2-1-1?

Washington Information Network 2-1-1 is a 501 (c) (3) non-profit corporation registered in the State of Washington. WIN 2-1-1 is responsible for:

- ☎ Establishing regional call centers;
- ☎ Organizing the collaboration of local service providers to provide high quality information;
- ☎ Negotiating with the telephone companies to establish 2-1-1 services;
- ☎ Coordinating marketing of the 2-1-1 effort and benefits; and
- ☎ Raising matching funds to leverage grants from private donors and federal and state funding.

What is AIRS?

AIRS, the Alliance of Information and Referral Systems, was incorporated in 1973 to improve access to services for all people through the mechanism of information and referral. The mission of AIRS is “to advance the capacity of Information and Referral providers to better serve their communities”. In support of its mission, AIRS provides publications and international training conferences and serves as an information and referral clearinghouse.

What is InfoLink?

United Way InfoLink evolved as a project of Leadership Kitsap, a non-profit organization whose mission is “to promote informed and committed civic volunteerism”. Leadership Kitsap offers leadership opportunities for employees of businesses and government who wish to learn more about needs and services in the community.

InfoLink began providing information and referral in Kitsap County on June 1, 1998 in collaboration with Kitsap Mental Health Services, Harrison Hospital, Kitsap Physicians’ Services, Bremerton-Kitsap County Health District and Kitsap Community Network. In 2003 United Way of Clallam County became a partner in the effort, and services were also extended to Jefferson County. The small staff (1.25 FTE) of InfoLink of the Peninsulas is available between 8:30 AM and 5:30 PM Monday through Friday. Crisis Clinic of the Peninsulas volunteers handle after hours and weekend calls. InfoLink and Crisis Clinic volunteers handle over 2,300 information and referral calls annually. To accommodate community needs, InfoLink has:

- ☎ Developed a comprehensive, centralized database that is freely shared with individuals and participating agencies;
- ☎ Enhanced coordination and facilitated exchange of information among agencies;
- ☎ Helped agencies to effectively and efficiently deliver information;
- ☎ Compiled data to identify gaps in services and support overall assessment of community health; and
- ☎ Refined and expanded data on an ongoing basis.

The shared database of nearly 2,000 service providers in three counties not only supports the responses to these calls, but is also available to the public through the internet, generating over 9,000 hits annually. As a result of the scope and excellence of our services, InfoLink is the logical choice to develop and implement 2-1-1 on the Kitsap and Olympic Peninsulas.

The opportunity presented by 2-1-1 will significantly expand and streamline access to the InfoLink services. Transitioning to a 2-1-1 system serving the geographically isolated Kitsap and Olympic Peninsulas will require a multi-faceted approach that includes:

- ☎ Ensuring that 2-1-1 is the primary means through which people access the services, thus taking advantage of its easy-to-remember, easy-to-use telephone number;
- ☎ Leveraging statewide promotions that will accompany the rollout of 2-1-1 for the initial start-up regions;
- ☎ Enhancing client access to services by continuing to provide information and referral services 24/7/365; and
- ☎ Meeting the increased demand for information and referral service through technological improvements and expanding staffing.

System Highlights

United Way 2-1-1 of the Peninsulas will continue to operate information and referral services at the Kitsap Mental Health Services' site through a Memorandum of Understanding (MOU) similar to that which has been negotiated previously. Additional MOU's among the United Way of Kitsap County, United Way of Clallam County and United Good Neighbors of Jefferson County will also be developed. All MOU's will define partnerships, operating arrangements and support the necessary collaboration to better serve regional needs.

The following points highlight the benefits of using the 2-1-1 system for our expanded and upgraded InfoLink service:

- ☎ Offers system-wide efficiency and connectivity;
- ☎ Provides an innovative response to the demand for access to critical community information and referral services;
- ☎ Allows greater access for people;
- ☎ Builds on a proven service model that only requires funding for improvements, not proof of concept;
- ☎ Creates a clear regional vision and growth strategy driven by experienced and representative leadership;
- ☎ Utilizes technology to save money, manage information and track social service trends; and
- ☎ Creates a three-county 2-1-1 system that can play a vital role in Homeland Security and/or serve as a support system for community emergency/disaster management.

Trends Impacting Demand for 2-1-1

Economic and demographic trends will significantly impact the demand for 2-1-1 in the coming years:

- ☎ Washington's jobless rate has been higher than the national average.
- ☎ Resources available to support the operations of nonprofit agencies and community programs are diminishing due, in part, to the decline in government funding and the increased demand and competition for private funding.
- ☎ Demographic changes, such as aging, indicate a growing demand for health and human services information and referral for individuals and their caregivers.
- ☎ Increasing demand for culturally sensitive social services reveals a need for the ability to communicate with non-English speaking callers, particularly those who speak Spanish.
- ☎ Low-wage workers and their families face the ongoing challenge of locating affordable housing.
- ☎ The increase in the number of "working poor" due to welfare reform has resulted in an increase in the number of low-income working families seeking health and human services.
- ☎ The number of employers providing health benefits has decreased, creating an increasing number of individuals and families seeking affordable health care.
- ☎ Ongoing deficiencies in investments in human capital in the Northwest have been identified at all levels, including early childhood education, primary and secondary schooling, higher education and adult education and workforce training, thus contributing to poverty³.

Program Operations

The 2-1-1 abbreviated dialing code for the three-county region will ring to our upgraded InfoLink line. 2-1-1 of the Peninsulas will be a 24/7/365 operation through a continued partnership with the Kitsap Mental Health Services' Crisis Clinic.

³ David Harrison and Bob Watrus, *On Getting Out – and Staying Out – of Poverty*, p. 36

Financial Summary

InfoLink of the Peninsulas is currently receives operating dollars totaling \$60,800 from the following sources:

- ☎ United Way of Kitsap County
- ☎ United Way of Clallam County

In addition, Kitsap Mental Health Services provides in-kind support consisting of technology support, facilities, administrative costs and Crisis Clinic volunteers at an estimated value of \$93,754. Total cost of current operations including in-kind support, is \$154,554.

Use of Proceeds

Funding will be used as follows:

- ☎ **Telecommunications and technology.** One-time and ongoing expenses to upgrade the equipment used for 2-1-1 purposes.
- ☎ **Staff expansion and training.** Gradual increase in staffing and related training to improve quality and accuracy of services and to meet increased demand for 2-1-1 service.
- ☎ **Public education.** Execution of our public education and communications strategy and the development of marketing tools.
- ☎ **Capacity building.** Training and technical assistance to build capacity and to facilitate the transition to 2-1-1.

(See financial summary details on next page)

Financial Summary Details


<i>For year ending (\$)</i>	2006	2007	2008	2009	2010
Funding					
Federal: Government Grants	40,000	40,000	50,000	75,000	100,000
State Legislative Appropriation	80,000	80,000	80,000	125,000	100,000
County/City/Local: Government Grants	17,500	17,500	35,000	50,000	50,000
KMHS IN-KIND	93,754	135,583	146,557	-	-
Fund Raising, Contributions & Sponsorships	25,000	25,000	40,000	75,000	75,000
United Way (Kitsap, Clallam, Jefferson)	69,000	71,070	73,202	75,398	77,660
ESHB #2163 Local Funding	30,000	30,000	30,000	40,000	40,000
Sales and Fees for Service	-	-	20,000	30,000	30,000
Total Funding	<u>355,254</u>	<u>399,153</u>	<u>474,759</u>	<u>470,398</u>	<u>472,660</u>
Cost of Services					
211 Service	204,730	276,621	316,247	331,242	345,737
Telecommunications & Technology	12,325	16,335	22,822	23,468	24,132
Total Cost of Services	<u>217,055</u>	<u>292,956</u>	<u>339,069</u>	<u>354,710</u>	<u>369,869</u>
General & Administrative					
Marketing	34,620	43,000	38,000	33,000	28,000
General & Administrative	29,257	30,733	31,439	36,128	36,546
Total General & Administrative	<u>63,877</u>	<u>73,733</u>	<u>69,439</u>	<u>69,128</u>	<u>64,546</u>
One-Time Transition Costs					
Total Transition	<u>60,865</u>	<u>8,125</u>	<u>48,125</u>	<u>42,125</u>	<u>2,000</u>
Net Funding Need	<u>\$ (13,457)</u>	<u>\$ (24,339)</u>	<u>\$ (18,126)</u>	<u>\$ (4,435)</u>	<u>\$ (36,245)</u>

InfoLink of the Peninsulas: Background and Strategic Relationships

Background

Crisis Clinic of the Peninsulas, the third oldest mental health crisis hotline in the United States, began serving Kitsap County residents in 1965. A group of private mental health practitioners, known as Kitsap Mental Health Association, recognized the need for this type of service and began a very austere operation in a small workspace in the former American Red Cross building in downtown Bremerton. During regular business hours, local mental health professionals responded to crisis phone calls; volunteers provided after hours and weekend coverage. Eventually, the Crisis Clinic became a program of Kitsap Mental Health Services which had its beginnings in 1978 as Kitsap Resources Consolidated. Similarly, Peninsula Community Mental Health Center (PCMHC) in Clallam County began a crisis line in the late 1980's. Then, in the 1990's, both PCMHC and Jefferson Counseling collaborated with Kitsap Mental Health and began using the KMHS crisis line. With the development of Regional Support Networks, Crisis Clinic of the Peninsulas evolved and now manages crisis calls for the area encompassing Kitsap, Clallam and Jefferson Counties. This strong collaboration and sharing of resources provided the underpinnings for the formation of InfoLink. In 1997, Leadership Kitsap and representatives from several service providers partnered with United Way of Kitsap County to form a comprehensive information and referral system called InfoLink. The system was officially launched in June 1998. The InfoLink system expanded in recent years to provide information and referral services throughout the Kitsap and Olympic Peninsulas in Northwest Washington. InfoLink currently maintains an Access database of over 2,000 agencies and organizations that provide services in the region.

Partners

 **Kitsap Mental Health Services and Crisis Clinic of the Peninsulas** – Established in 1978 as Kitsap Resources Consolidated, the current Kitsap Mental Health Services (KMHS) provides both mental health and behavioral healthcare services to children, families, adults and seniors in Kitsap County. Inpatient services are available to adults and adolescents. Executive Director Larry Keller and the staff at Kitsap Mental Health Services have welcomed the presence of InfoLink at the KMHS site in East Bremerton.

Established 40 years ago, Crisis Clinic of the Peninsulas has been critical to the success of InfoLink. Trained Crisis Clinic volunteers and InfoLink staff are co-located at the KMHS site. This co-location arrangement has been essential to the provision of 24/7 phone coverage for InfoLink. One full-time and one part-time employee respond and manage InfoLink calls and electronic requests for information from individuals from the three-county region during regular business hours. After hours, from 5:30 PM until 7:30 AM, Crisis Clinic volunteers answer InfoLink calls.

 **United Way of Kitsap County** – Although InfoLink was designed and implemented by Leadership Kitsap and is located at Kitsap Mental Health Services, it is a program

of United Way of Kitsap County. Until 2003, United Way of Kitsap County provided all the financial resources for the operating costs (primarily wages) of InfoLink. Because InfoLink is a regional service, access has been maximized by including electronic access and a toll-free telephone number. The relay service is used for callers who may be hearing impaired. Non-English speaking callers are accommodated by an interpretive service that Kitsap Mental Health Services has available. United Way of Kitsap County is the lead agency in the development and implementation of United Way 2-1-1 of the Peninsulas. United Way Executive Director David Foote and Jody Moss, United Way of Clallam County Healthy Communities Coordinator, serve on the WIN 2-1-1 Advisory Board.

☎ **United Way of Clallam County** – United Way of Clallam County is a key partner on the regional team that has been involved in the planning for 2-1-1. The United Way Healthy Communities Coordinator serves on the 2-1-1 of the Peninsulas Advisory Board, and the WIN 2-1-1 Advisory Board.

☎ **United Good Neighbors of Jefferson County** – United Good Neighbors manager, Bob Peden, serves on the 2-1-1 of the Peninsulas Advisory Board. It is anticipated that United Good Neighbors of Jefferson County will be a full participant in 2-1-1 and that relationship will be defined in a Memorandum of Understanding by January 2006.

Strategic Relationships

Due to the significant and sustained partnerships on the Kitsap and Olympic Peninsulas, it has been possible to provide the breadth of service delivery that is currently available. Through working partnerships we have been able to steadily expand the scope of our services, making them accessible to more people in our geographically-isolated region.

As we prepare to take the most significant step in the history of InfoLink, these same strategic partnerships will be critical to our success. The transition to 2-1-1 will allow us to serve all of our partners' constituents more effectively. As a result of implementation of 2-1-1 we will also be able to improve our service to our partners with greater capacity to support the delivery of their programs and services into the communities.

☎ **Public Sector Relationships.** We believe that building partnerships with the public sector locally, statewide and nationally will be critical to 2-1-1's sustainability and the ongoing quality of service to the community. These partnerships will be guided by a spirit of openness and a willingness to share information and mutual support.

In Kitsap County, United Way has garnered the unanimous endorsement of the Kitsap Regional Coordinating Council which is the local council of governments for Kitsap County, including the Cities of Bremerton, Bainbridge Island, Port Orchard and Poulsbo, Port of Bremerton and Suquamish and Port Gamble S'Klallam Tribes. The county commissioners in Jefferson County have officially endorsed the 2-1-1 project. The 2-1-1 Advisory Board members in Clallam County have been providing informational sessions for local elected officials and government agencies in that county.

☎ **Specialized Information and Referral Relationships.** United Way 2-1-1 of the Peninsulas call center will be the comprehensive information and referral program for the Kitsap and Olympic Peninsulas. As appropriate, we will negotiate specific Memorandums of Understanding (MOUs) between 2-1-1 of the Peninsulas and other specialized information and referral or assistance. Purpose of the MOUs will be to define the specific relationship, telephone and data collection procedures, and the referral process to be implemented with the partners. Some information and assistance programs have participated in the three-county planning process, while others are being informed through community meetings. A listing of supporters can be found in the appendices in this business plan.

☎ **United Ways.** United Way of Kitsap County has assumed the lead role in the planning for 2-1-1 implementation on the Kitsap and Olympic Peninsulas. As the primary funder and owner of the existing InfoLink system, United Way of Kitsap County has a Memorandum of Understanding with Kitsap Mental Health Services addressing the co-location of InfoLink with the KMHS Crisis Clinic of the Peninsulas and operating functions. In addition, the United Ways of Kitsap and Clallam Counties have a Memorandum of Understanding describing their working relationship with regard to InfoLink.

United Good Neighbors of Jefferson County has been involved in the planning process and is expected to become a full partner in the 2-1-1 endeavor by January 2006. InfoLink has been providing information and referral services to Jefferson County residents for over two years.

State Partners

The 2-1-1 of the Peninsulas' Advisory Board is represented on the WIN 2-1-1 board of directors by the Executive Director of United Way of Kitsap County, the KMHS Crisis Clinic manager and the United Way Healthy Communities Director in Clallam County. WIN 2-1-1 has been an ongoing resource to United Way 2-1-1 of the Peninsulas during the planning process. 2-1-1 of the Peninsulas will continue to coordinate its efforts with WIN 2-1-1 to ensure consistency and program quality. State partners include:

☎ **Washington Information Network 2-1-1 (WIN 2-1-1).** In 2003, the Washington State legislature gave WIN 2-1-1 the authority for the planning and implementation of the 2-1-1 system in Washington State. In addition, WIN 2-1-1 was authorized to designate the call centers within the state. WIN 2-1-1 prepared a statewide business plan which includes funding sources.

WIN 2-1-1 coordinates the activities of over 90 non-profit, government and information and referral organizations as they work together to implement 2-1-1 in local areas and statewide. WIN 2-1-1 is providing technical assistance to build call center capacity in areas where there is no comprehensive information and referral service; in areas where there are existing centers, WIN 2-1-1 provides mentoring to help build capacity in order to qualify to meet the national standards for the Alliance of Information and Referral Systems.

☎ **Northwest Alliance of Information and Referral Systems (NW-AIRS).** As the regional affiliate of the national AIRS organization, NW-AIRS provides training and support opportunities for comprehensive and specialized information and referral organizations in Washington, Oregon and Idaho. NW-AIRS is working directly with WIN 2-1-1 and AIRS to test several of the new accreditation and certification tools that will be used by 2-1-1 call centers throughout the country. The senior InfoLink staff member received AIRS certification in October 2005; the other staff member has recently participated in the certification process and is awaiting the results of her testing.

Preparation for 2-1-1: Milestones

Preparing to Become a 2-1-1 Call Center

On January 12, 2005, WIN 2-1-1 approved the United Way 2-1-1 of the Peninsulas as the 2-1-1 provider for Kitsap, Clallam and Jefferson Counties. This approval was based on the strong collaboration among groups in the three-county region and the accomplishments of the existing InfoLink system that has been operating successfully for seven years.

Listed below are milestones that have been achieved in preparation for implementation of 2-1-1:

- ☎ The Federal Communications Commission designated the three-digit number 2-1-1 as the “health and human services information and referral number” for the United States.
- ☎ Kitsap Mental Health Crisis Clinic Manager began participation in 2-1-1 statewide planning.
- ☎ Memorandum of Agreement negotiated between Kitsap Mental Health Services and United Ways of Kitsap and Clallam Counties.
- ☎ InfoLink senior staff member becomes accredited by AIRS as a certified resource specialist.
- ☎ United Way recruited business planning consultants.
- ☎ WIN 2-1-1 approved our application to become a 2-1-1 call center.
- ☎ Consultants began evaluating InfoLink of the Peninsulas’ current operation and identified needed improvements to facilitate the transition to becoming a 2-1-1 call center.
- ☎ Conducted an assessment of data collection and business processes to determine ways to streamline efforts and transition to an integrated database and data collection and reporting system.
- ☎ Created PowerPoint presentation to educate community partners about 2-1-1 and its benefits to the region.
- ☎ 2-1-1 Planning Committee is dissolved. The United Way 2-1-1 of the Peninsulas Advisory Committee is appointed.
- ☎ Informational sessions were conducted for key local partners.
- ☎ WIN 2-1-1 Executive Director Tom Page announced the state legislature’s approval of \$1,000,000 in capital funding for the 2-1-1 projects in Washington State.
- ☎ Developed funding request for infrastructure and other implementation needs.
- ☎ Kitsap Regional Coordinating Council and Jefferson County Commissioners endorsed InfoLink 2-1-1 of the Peninsulas.

United Way 2-1-1 of the Peninsulas System Highlights

InfoLink 2-1-1 Information and Referral Line Highlights

The following points highlight the benefits of using the 2-1-1 system for our InfoLink line:

☎ **System-wide efficiency.** The 2-1-1 based expansion of InfoLink services will have a ripple effect throughout the human service delivery systems in Kitsap, Clallam and Jefferson Counties.

- Through directing more callers to the most appropriate and available service for which they are eligible, we will relieve demand currently generated by people who now go to inappropriate sources.
- Through provision of expanded access, more agencies can refer their clients and random callers to 2-1-1 of the Peninsulas for appropriate referrals, relieving their workload.
- By being prepared to assist in times of emergencies, we can relieve the demand on first responder organizations that are often flooded with callers seeking to offer help or to obtain basic information.
- As an integral part of the statewide 2-1-1 system in a highly transient state, we will be better able to connect people with services in the areas where they or members of their families live and work.
- As a result of our improved ability to identify local needs through our data collection, we can apprise human service planners and policy-makers of community needs which will help them determine where to direct scarce resources.

☎ **Innovative response to the demand for access to critical information and referral services.** 2-1-1 is a groundbreaking, efficient solution that eliminates the confusing maze of information and services that often overwhelm individuals who need help. 2-1-1 offers professionals and organizations dedicated to providing social assistance a way to enhance their impact and maximize scarce resources.

☎ **More accessible for more people.** Through installation of an improved telephone system, our 2-1-1 line will improve access for individual callers. Building a 2-1-1 system as the gateway to information and referral on the Kitsap and Olympic Peninsulas will:

- Enhance the existing information and referral infrastructure and continue round-the-clock, seven-day-a-week coverage;
- Improve the existing InfoLink database; instead of utilizing the existing inefficient Access database, we will use Resource House with a national standard taxonomy that will allow easy exchange of information with other databases;

- Serve as a vital coordinating point and follow-up to organizations that provide first line response during local or national emergencies; and,
- Generate reports that proactively identify problems, trends, or issues in our region so that policy makers can use this information to better understand existing and emerging social and health needs and allocate resources accordingly.

☎ Builds on a proven service model that only requires funding for technological upgrades and expansion, not proof of concept.

At this time, there are 169 operational 2-1-1's that serve more than 46 percent of the population in the United States. These systems cover all of part of 32 states. In 2004, InfoLink staff and Crisis Clinic volunteers responded to 2,283 calls and received 9,171 electronic inquiries. As 2-1-1 is implemented on the Kitsap and Olympic Peninsulas, we anticipate call volume to increase by as much as 20 percent by 2006 a result of growth projections, community outreach and education and the leveraging of WIN 2-1-1's marketing approach.

☎ Clear regional vision and growth strategy driven by strong experienced leadership.

The continued collaboration among United Ways in Clallam and Kitsap County, United Good Neighbors of Jefferson County and Crisis Clinic of the Peninsulas will produce a comprehensive strategy that will direct the implementation of 2-1-1 services on the peninsulas. The planning process, including the engagement of community officials and service providers, has created a shared ownership of 2-1-1 at the regional level and a foundation for success supporting the effort to bring the system to scale throughout Washington and the Northwest. A driving principle in this effort is the desire to facilitate a regional Northwest plan rather than promoting a disjointed territorial or political approach to service. This collaborative approach leverages the competencies and unique assets, insights and professional experiences of all key partners.

☎ Utilizing technology to save money, efficiently manage information and track social service trends.

Rather than having many systems and agencies engaged in the collection of resource information, one system (2-1-1) can assume this responsibility and easily share data with other systems, thereby reducing duplication of funds and time resources. We will have a cost-effective telecommunications solution capable of meeting current and future demands. Portability of the technology and telephony will allow for eventual transition to another site as call demand creates the necessity for additional staffing and work stations. The current InfoLink database of service providers is available at www.unitedwayinfo.org. A customer survey, which will be improved prior to the implementation of United Way 2-1-1 of the Peninsulas, is also available on the website. Internet site links to other web sites that provide critical social service information are also listed on this site.

☎ **Creating a three-county 2-1-1 system that can play a role in Homeland Security and/or serve as a support system for community emergency / disaster management.** During emergencies or natural disasters such as floods, earthquakes or severe weather, our 2-1-1 system can assist the community by relieving the burden on first responders. By freeing the first-response organizations' resources from staffing telephone lines for non-emergency requests and during recovery periods following an emergency, our system can serve as a longer-term resource to inform individuals where to send donations, volunteer, or get information on the details of local recovery efforts.

For example, Toronto's 2-1-1 has proven not only to be a dependable 24-hour helpline connecting people to services – but also a caring voice during a long, dark night. During the August 2003 blackout, people called 2-1-1 for updates, information, and reassurance. The service experienced a three-fold increase in calls during the night of the blackout, and in the week following had 11,000 calls compared to the normal 6,000, handling the after-effects of the crisis. In addition, during the SARS crisis, Toronto 2-1-1 counselors updated callers on the situation and connected them to appropriate services such as TeleHealth Ontario. During the Iraqi conflict, Toronto 2-1-1 coordinated and maintained a special list of services for the Iraqi and Arab communities.

Public Impact and Benefits to Callers

Public Impact

United Way 2-1-1 of the Peninsulas will provide the right information in a variety of ways (web, phone, and printed materials) at the right time to meet the needs of diverse populations. The key benefits of a 2-1-1 system to Kitsap and Olympic Peninsula residents will include:

- ☎ **Fostering the use of available social, health and human service information and assistance.** By creating an identifiable brand that is associated with easy-to-access assistance, our 2-1-1 system can make it both easier and acceptable to use human and social service systems. *All* Kitsap and Olympic Peninsula residents can use United Way 2-1-1 to navigate the complex and ever-growing maze of government, non-profit and community health and human service agencies.
- ☎ **Creating acceptability to access information free of judgment.** Those who are not used to or adept at requesting help will encounter a more comfortable experience when accessing the 2-1-1 system.
- ☎ **Employing high-touch, skilled personal interaction to analyze information seekers' needs.** Callers often face complicated issues requiring information and referral specialists to be sensitive and knowledgeable. Existing staff who are already AIRS certified and future staff that will become certified will be able to connect the callers with the best available services for their individual needs. Skilled staff will be able to identify needs and assist the individual caller in mapping a strategy that empowers the person to access the appropriate assistance. Our regional, state and national 2-1-1 system will have the capacity to change peoples' lives by helping them move toward security and independence.

For example:

- Senior citizens can be helped to access needed medications, meals-on-wheels, or in-home assistance that enables to remain in their own homes for as long as it is safely possible.
- Parents will find the help they need to locate licensed, affordable child care so they can focus on their jobs.
- People with special needs can learn about transportation options available to them in order to maintain active lives or access needed services in their communities.
- Victims of domestic violence can quickly locate shelter, counseling and support groups.
- Parents that need help addressing the behavioral issues of their teenage family members can learn of the various services, such as counseling or foster care.

- Homeless individuals and families can be directed to the resources that will help them secure shelter, transitional or permanent housing.
- Those who may be dealing with addiction can be directed to support groups or treatment options to assist in their recovery.
- Communities that are affected by natural or man-made disasters can learn emergency information and available disaster relief efforts.
- Individuals and families who are affected by hunger and food insecurity can learn how to access the nearest food bank or hot meal program.

📞 Generating new, comprehensive data that can be aggregated and analyzed at the state and local levels and used by policy makers to improve social services.

United Way 2-1-1 of the Peninsulas can serve as the social barometer that provides accurate, easy-to-access and up-to-date information on emerging needs. 2-1-1 of the Peninsulas will generate information that can help shape public policy, evaluate services and support advocacy efforts. As a result, the information that we gather will contribute to more effective use of resources, including tax dollars and charitable donations.

📞 Our residents in the Kitsap and Olympic Peninsulas region will be able to give help as well as to get help. 2-1-1 will become the preferred number to call to get and give help. To foster greater coordination and professionalism in volunteering, the United Ways of Kitsap and Clallam Counties and the United Good Neighbors of Jefferson County visualize greater collaboration than ever before.

📞 Improved access to non-emergency assistance during times of crisis. Natural disasters and threats or attacks on our homeland are just two complex types of crises that our Emergency Management Services professionals must face. During disasters in other parts of the United States (such as Florida hurricanes), 2-1-1 has played a significant role in providing information, thus eliminating some of the pressure from the 9-1-1 system. Having a well-publicized 2-1-1 line will allow residents on the peninsulas to have information literally at their fingertips.

Benefits to Callers

The significant benefits of 2-1-1 *to the caller* include:

- 📞 Ability to access free and up-to-date information at anytime;
- 📞 Information that is provided in various formats – telephone, web and printed material – and is available to those with limited English proficiency or hearing impairments;
- 📞 Regional information serving people where they live and work;
- 📞 Information and referral specialists who are skilled at assessing the callers’ needs and providing multiple service options;
- 📞 Specialists who can provide an overview of various systems in order to help the caller access hassle-free services;

- ☎ Responsive specialists who offer non-judgmental service while paying strict attention to confidentiality;
- ☎ Personalized information that matches the callers' unique needs, abilities and location; and,
- ☎ The ability to link callers to the vast 2-1-1 network throughout Washington State and the United States.

Trends Impacting Demand for 2-1-1

Economic & Demographic Trends

Economic and demographic trends will significantly increase the demand for our 2-1-1 system in the coming years:

☎ **Washington jobless rate remains higher than the national average.** Washington's jobless rate in June 2005 was 5.5 percent, still higher than the United States rate of 5 percent.⁴ Many of the layoffs in Washington have targeted relatively high-paid workers, such as Boeing, dot-com and high-tech employees.⁵ As such, Washington's unemployment situation is spawning *new consumers* of social services – people who have never relied on social services before. For the first time, asking for rent and utility bill assistance is as great as or greater than the demand for shelter and food. On the Olympic Peninsula, former family-wage jobs in the fishing and timber industries have diminished, while low-wage service jobs are on the rise. This *new consumer group* needs assistance just to stay where they are economically. "...more than one out of four American working families now earns wages so low that they have difficulty surviving financially. These are families with responsible, hardworking breadwinners who want to get ahead but hold down low-paying jobs with inadequate benefits and little hope for advancement."⁶ In the Northwest, poverty in suburban areas is higher than the national average. This could be due to rising housing prices in gentrifying urban neighborhoods forcing people with lower incomes to find new housing options. In Washington, a total of 22.7 percent of the poor live in suburban and non metro areas.⁷ In Clallam County, many of the jobs lost over the past year were in transportation and government. With only 140 new jobs created, Clallam County saw a meager .6 percent annual job growth rate. Jefferson County experienced an even smaller growth in jobs - .2 percent. Over half of the 1,500 new jobs created in Kitsap County since May 2004 has been low-wage retail and hospitality jobs. Higher wage federal jobs slipped by 100 jobs in the same time frame. Kitsap County's annual job growth rate was hovering at 1.8 percent compared with the state's average of 2.6 percent. Kitsap's significant military presence continues to provide a measure of stability in that county.

⁴ The *Kitsap Sun*, "Washington Jobless Rate Drops to 5.5 Percent," July 20, 2005.

⁵ The *Seattle Times*, "Report: Income, poverty hold steady in Washington," September 28, 2003.

⁶ From Executive Summary of "Working Hard, Falling Short." A product of the Working Poor Families Project supported by the Annie E. Casey, Ford and Rockefeller Foundations.

⁷ David Harrison and Bob Watrus, "On Getting Out – and Staying Out of Poverty," Page 27.

☎ Federally-recognized tribes have a strong presence in Kitsap, Jefferson and Clallam Counties. The Kitsap and Olympic Peninsulas are home to the following tribes: Makah and Hoh (Jefferson County); Suquamish and Port Gamble S’Klallam (Kitsap County); and, Lower Elwha Klallam, Quileute, and Jamestown S’Klallam (Clallam County). According to a study conducted by the Northwest Area Foundation, the percentages of tribal residents that living below poverty level are as follows:

Tribe	Below Poverty Level
Hoh	42.0%
Quileute	34.5%
Makah	31.3%
Lower Elwha	26.6%
Port Gamble S’Klallam	17.3%
Suquamish	7.0%
Jamestown S’Klallam	0.0%

Although some tribes maintain strong social service safety nets for tribal members, impoverished Native Americans often seek services through the mainstream social service network, as indicated by the calls received by current InfoLink information and referral staff. Coincidentally, the supervisor for InfoLink is Native American and is skilled at the delivery of culturally-relevant services. United Way 2-1-1 of the Peninsulas will work to collaborate with tribal human services in order to ensure culturally-appropriate services are available to Native American callers.

☎ Pockets of poverty exist in all three counties as demonstrated by the number of children receiving free and reduced-price lunches at school. In Clallam County, 47 percent of all children received free and reduced-price lunches in 2004. Extremely high poverty areas include Cape Flattery School District where 65 percent of the children receive and the Quileute Valley School District where 56 percent of the students are eligible for free and reduced-price lunches. Jefferson County also has school districts that are serving high percentages of children from poor families, including Queets Clearwater District with 87 percent of the children receiving free lunches; Brinnon with 60 percent; and, Quilcene with 49 percent eligible for free and reduce-priced lunches. Kitsap County fares somewhat better; countywide, 26 percent of the children are eligible. Bremerton School District is by far the most poverty stricken school district in the county with 48 percent of its students receiving free and reduced-price lunches.⁸

⁸ Office of Superintendent of Public Instruction, Child Nutrition Program

☎ The need for social and health services is increasing at the same time non-profit organizations are struggling to keep their doors open. Government funding, such as Community Development Block Grant funding, is decreasing as a result of a new direction in federal priorities. Thus, private foundation funding is becoming increasingly competitive as social service agencies in the non-profit sector attempt to maintain adequate service levels through private grant seeking. As a result of the increasing number of wage earners that are underemployed or do not have full employment, the demand for services and information about services steadily increases. According to a study released by the Northwest Area Foundation, “Poverty in the Northwest region varies from the rest of the nation in that poverty in central cities is lower and poverty in suburban areas is higher.” The Northwest Area Foundation suggests that the current Federal Poverty Level standard is severely deficient and that a more accurate gauge would likely double the current estimate of people living in poverty. More people than ever are turning to social services such as food banks and housing and shelter providers. Washington remains among the top ten states in the United States for hunger and food insecurity. Shelters are typically operating at maximum capacity and must turn away many individuals and families that are seeking housing. During state fiscal year 2002-2003, nearly 4,800 individuals were turned away, or approximately 10 percent of the total number served during that same time frame.⁹

The increase in demand for social services and the decline in funding for social services suggest that finding the right resource for a particular need is becoming even more complex. The public will experience a growing need for a trusted service like 2-1-1 to assist in navigating closures, reductions and changes to existing services, such as changes in eligibility requirements, location of services and overall scope of services.

⁹ *Emergency Shelter Assistance Report*, Washington State Coalition for the Homeless, www.endhomelessnesswa.org.

☎ Demographic change, such as aging, indicates a growing demand for health and human services information and referral for caregivers. The United States is preparing for a major demographic shift as members of the baby boom generation begin to retire. The number of persons 65 and older in Washington State increased by 21.9 percent between 1990 and 2004. By 2004, persons age 65 or over represented over one-fifth of the population in both Clallam and Jefferson Counties.¹⁰ The Office of Financial Management refers to Jefferson and Clallam Counties as “recreational retirement counties”. They are attracting increasing numbers of elderly persons. The following chart displays data from the Washington State County Population Projections for Growth Management showing projections of population age 65 and over as a percent of the total county population through 2020:

County	2005	2010	2015	2020
Kitsap	11.13%	12.25%	14.59%	17.03%
Clallam	22.57%	23.75%	25.53%	27.54%
Jefferson	23.48%	26.94%	31.47%	35.47%

The resulting cost of care is expected to be overwhelming and a significant strain on families caring for their aging relatives. These demographic changes will have a serious impact on the family members and organizations that provide care and support for the elderly. As a result, more resources will be necessary to connect the elderly and their family members with the specific help they need. A phone call to 2-1-1 from anywhere in the country will enable family members to secure the information needed to meet the care giving needs of their elderly relatives.

☎ Increasing demand for culturally sensitive services and ability to communicate with non-English speaking callers. The three counties to be served by 2-1-1 have experienced a growing number of non-white residents, according to the U.S. census. Although the aggregate of Asian/Pacific Islander groups comprise the largest non-white group in Kitsap County, American Indian and Alaska Native are the largest non-white group in Clallam and Jefferson Counties. Persons of Hispanic or Latino origin are the largest minority group in the country and in Washington State. This population grew by 105 percent in our state between 1990 and 2000. They represent 3.4 percent of the population in Clallam County, 2.1 percent in Jefferson County and 4.1 percent in Kitsap County. InfoLink has easy access to interpretive services through AT&T Language Line Services when the need arises. Immigrants often fall into the lower income and educational brackets, creating the need for access to employment opportunities, English language classes and affordable health and child care. Access to a comprehensive database of reliable, culturally sensitive information

¹⁰ “Selected Estimates, Reports and Other Information”, Washington State Office of Financial Management

plays an important role in their transition to becoming self-supporting members of the community.

☎ Welfare reform has increased the need among low-income families for health and human services. Families that have departed the welfare roles to become self-sufficient through training and employment need ongoing help navigating the complex maze of programs and services that are designed to help them succeed. While thousands of families no longer receive Temporary Assistance for Needy Families (TANF), they often need the added support of the social service safety net in their communities to maintain stability in their lives. 2-1-1 can play an important role in ensuring that those families are able to locate specific services that help them achieve wholeness for their families.

Program Operations

Program Operations Overview

2-1-1 of the Peninsulas' Advisory Committee will be responsible for establishing working relationships with local and state health and human service agencies throughout the Kitsap and Olympic Peninsulas, including tribal health and human services. A close working relationship with the WIN 2-1-1 system will prevent duplication of efforts and ensure a smooth transition.

Program Operations – Improvements Needed to Build and Sustain the 2-1-1 System

For the past seven years, InfoLink information and referral staff has answered calls Monday through Friday from 7:30 AM to 5:30 PM. After hours and on weekends, calls have been handled by Crisis Clinic volunteers. Since the program is located in Kitsap County, but also serves Jefferson and Clallam Counties, a toll-free number is available to accommodate callers from the outlying areas. We anticipate continuing information and referral service through utilization of staff similar to what is currently in effect, and continued use of Crisis Clinic volunteers for after hours coverage. Interpretive services have been available through AT&T Language Line. Callers who have hearing impairments are able to communicate via the Speech to Speech/Washington Relay system.

The InfoLink database of nearly 2,000 service providers in the three counties supports our telephone inquiries. A version of the database is also available on the web, receiving over 9,000 hits per year. Using the information from the database and call logs, InfoLink is able to produce limited reports that show caller profile, service distribution and other information that is vital to system planning.

Under the new identity of *United Way 2-1-1 of the Peninsulas*, the following components will be upgraded and/or expanded:

(See table on next page)

	Existing InfoLink Information Line & Community Resources System Database	Years 2 - 5
Focus	Primarily provide health and human services information offered by non-profit agencies and government.	Provide public health and emergency/disaster response information, and to link volunteer opportunities.
Hours of Operation	Monday to Friday 8:30 AM to 5:30 PM. with InfoLink staff; after hours Crisis Clinic volunteers	Continue current model for the foreseeable future
Personnel	1.25 FTE I&R Specialists, plus .20FTE Supervision; volunteers cover after hours and weekend.	Increased staffing to 5.8 FTE by 2006; 7.9 FTE by 2007; 8.9 FTE by 2008 and 9.0 by 2009; and, 9.2 FTE by 2010 ¹¹ .
Staff Credentials	Supervisor and one specialist are AIRS certified. Part-time staff member has undergone AIRS testing.	All eligible staff will be AIRS certified I&R Specialists. In-service training available ongoing.
Quality Assurance	Implement a formal quality assurance plan that is outcome based.	Achieve national accreditation from Alliance of Information and Referral Systems (AIRS) by the end of year 1 of implementation of 2-1-1.
Relationship with Service Providers	Informal working relationships with providers of health and human services.	Formalize relationships with MOUs with key specialty help/crisis lines, providers of volunteer services, emergency/disaster response, public safety, etc. by the end of year 1 of 2-1-1 implementation.
Data Collection	Information is entered into an Access database for generating reports, such as demographics and call volume.	Transition to Resource House database providing integration with statewide system and conformity with AIRS standards.

¹¹ Staffing numbers include Crisis Clinic volunteers.

Reporting	Demographic and other reports are prepared on an as-needed basis.	Expand capacity for providing specialized reports and comprehensive statewide reports.
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Community Services

As United Way InfoLink becomes a 2-1-1 call center, we will provide these services:

- ☎ **24/7/365 I & R telephone access.** In 2006 and beyond, year-round, round-the-clock information and referral assistance will continue to be available. As part of WIN 2-1-1, assistance will be available statewide and across the country.
- ☎ **Database.** InfoLink will update and transfer the information in the existing database to Resource House which uses AIRS taxonomy. An accurate, localized database is essential to the successful operation of the 2-1-1 system. Temporary workers will assist with this transfer process scheduled for completion by December 2005.
- ☎ **Data collection and reporting.** Our current reporting capabilities have not been extensively utilized; however, with the improved software (Resource House) and the 2-1-1 brand, we expect substantial demand for various reports that can be produced with our enhanced capability. Our enhanced reporting capability will enable us to develop customized reports that will aid in identifying regional trends in human service needs.

Products and Services

Government and social service providers may wish to purchase a license through Resource House to have our database. With this arrangement, individual agencies will benefit by avoiding the need to maintain this component within their information system. It becomes a cost savings to the entire human services network to have comprehensive, accurate and current information source that is maintained by one agency.

Internal Functions

In order to operate as an effective 2-1-1 system, we will have essential internal functions in place that will provide for seamless, efficient operations. The 2-1-1 of the Peninsulas Advisory Committee will ensure that the following requirements are met as soon as possible:

☎ Quality Assurance. In order to offer a quality, professional service, the United Way 2-1-1 call center will meet the national standards established by AIRS. Application for accreditation will be completed by late 2006. Standards dictate the quality of the call center in the following key areas:

- 2-1-1 service delivery;
- Database management;
- Data collection and reporting;
- Cooperative community relationships; and,
- Organizational and professional requirements.

☎ Operations and staffing. Preceded by 40 years of the Crisis Clinic's successful operation, InfoLink has seven years of experience as an information and referral line; both will serve as the foundation for our transition to becoming a 2-1-1 call center. Existing policies and procedures will be modified to ensure compliance with AIRS standards. Existing staff members have sought and achieved AIRS credentialing, an important step towards our 2-1-1 transition. The supervisor (.20 FTE) is a Registered Counselor, Information and Referral Specialist and Native American Mental Health Specialist. Our full-time staff member is a Registered Counselor, Certified Information and Referral Specialist, and a Certified Resource Specialist. Our part-time staff member (.25 FTE) is a Registered Counselor. Crisis Clinic volunteers, the backbone of InfoLink's after hours information and referral system, have undergone extensive training and are familiar with community resources.

☎ Telecommunications and technology. State-of-the-art telephone and technology are critical to the successful operation of a superior information and referral service. Equally important are the experienced Information Systems (IS) personnel who will assume responsibility for maintaining the system. Kitsap Mental Health IS personnel acknowledge that their phone system and server are at or beyond capacity; Tracy Thompson, Kitsap Mental Health IS Director, has assisted in the development of a phone and technology plan that will pave the way for 2-1-1. Tracy and/or her staff will undergo the necessary training to work with the new server, software and phones and provide technical assistance to information and referral specialists as needed. Additional details are provided in the *Telecommunications & Technology* section.

☎ Public education strategy. A well-orchestrated public awareness campaign is pivotal to ensuring the effective use of United Way 2-1-1 of the Peninsulas. Across the United States, 2-1-1 call centers have found that the greater the publicity and public education, the greater the use of 2-1-1. Our planning committee and subsequent Advisory Committee have purposefully focused on building awareness among government, social service and media partners throughout the three-county region. These partnerships will continue through the implementation of 2-1-1 and ongoing. For the 2-1-1 rollout, the United Ways of Kitsap and Clallam Counties and United Good Neighbors of Jefferson County will provide regional leadership and

coordination with WIN 2-1-1. For more details, consult *Public Education Strategy* section.

☎ Continuous quality improvement and evaluation processes. In an effort to maintain quality and ensure customer satisfaction, United Way 2-1-1 will use an outcomes evaluation model. The following outcomes have been identified as necessary to support our regional 2-1-1 mission “*to provide a comprehensive integrated health and human services information and referral network for residents of the Kitsap and Olympic Peninsulas as part of WIN 2-1-1 and the national 2-1-1 initiative*”:

- Acquire measurable, relevant data;
- Identify system strengths and weaknesses;
- Identify training opportunities;
- Assure service quality, including the availability of accurate, up-to-date information;
- Improve delivery and standardization of services;
- Maintain solid working relationships with regional and community partners and WIN 2-1-1; and,
- Improve overall performance.

☎ Financing. We will work cooperatively with city, county and state government, United Ways of Kitsap and Clallam Counties, United Good Neighbors of Jefferson County and the philanthropic community to gain continued support for 2-1-1 service. See *Financing Strategy* for further details.

Giving Help

United Way 2-1-1 is a potential asset for community building, providing a new mechanism through which people can *give help* – volunteering their time, talents and energy, making material and monetary contributions and joining others in the community who share their concerns and priorities.

By positioning 2-1-1 as a primary connector to opportunities to *give help*, it also diminishes the subtle but often present stigmatization of people to call to *get help*. It is important for 2-1-1 to be recognized as a resource for the entire community, thus lessening the apprehension of those who, for the first time in their lives, require assistance.

We anticipate a close and complementary working relationship with emergency management agencies in our three-county region and other first responders. In the event of a natural or man-made disaster, we will be prepared to answer calls from those wishing to provide volunteer assistance or contribute in response to a community emergency, thus relieving the load on the first responders.

“2-1-1 is the way to get help and to give help” will be a featured part of our ongoing public education efforts.

Telecommunications and Technology

Telecommunications Overview

☎ Phone system and needed improvements. The existing InfoLink information and referral center phones are part of the Nortel Systems, Meridian-Option 61C system owned by Kitsap Mental Health Service. While Kitsap Mental Health has a sophisticated PBX, the switch is currently at capacity. The Crisis Clinic messages come into its own copper line and then routes via the Nortel Succession 3.0 system. This allows the Crisis Clinic to remain up should the incoming T-1 and/or phone switch have downtime. The information and referral system relies solely on the KMHS T-1 and PBX for operation. This system is not PRI or QSIG enabled and has limited IP capability.

Currently at maximum capacity, the phone system cannot accommodate the call volume and subsequent increase in phone lines that will be needed as a result of rollout of 2-1-1. The existing phone system is limited in its ability to transfer calls to another location. The current system is unable to supply Automatic Call Distribution (ACD) functionality (such as call volumes, average talk times, etc.)

Major upgrades to the KMHS phone system would be required, including adding trunk lines and additional cards to the Nortel system. These upgrades would not be cost effective as we look to the future of United Way 2-1-1 of the Peninsulas.

We have projected that in less than five years, 2-1-1 of the Peninsulas will “outgrow” its current location at Kitsap Mental Health Services, so it is important at this time to invest in a stand alone phone system and dedicated lines for data and voice that meet the current and projected future needs of 2-1-1. This would provide the portability that would allow the system to be moved from the Kitsap Mental Health campus to a new location at the appropriate time.

Because of these capacity issues, as well as the limitations of system location and portability, it is recommended that United Way 2-1-1 of the Peninsulas employ a stand alone phone system.

Plans for the New System

☎ **To improve services, reduce costs and provide Voice over Internet Protocol (VoIP) capability in preparation for the creation of a statewide 2-1-1 telephone network, the call center is researching new phone systems.** The new phone system (5-10 units) will incur additional costs for separate telephone lines, telephone system installation, technical training and ongoing maintenance. The cost of a new system with the following capabilities ranges from \$4,750 to \$8,400:

- Increased toll-free dialing area
- Enhanced called processing
- Improved functionality for information and referral specialists
- Provide callers and specialists live information about the processing of their calls
- Meet VoIP standards
- Have the ability to sort calls in Spanish or English
- PRI/QSIG enabled
- IP capability
- Supply ACD functionality

☎ **Network recovery.** At the present time, InfoLink is fortunate to be housed within the KMHS campus. InfoLink and the Crisis Clinic have shared resources and backup capability. The in-kind donation of Information Systems management will continue.

2-1-1 of the Peninsulas will have features built into its new telephone system that will ensure continuous telephone operations in the event of a network failure. The UCN system that is under consideration by WIN 2-1-1 has the functionality to transfer calls elsewhere, such as another call center. A procedure will be established for temporary routing of calls if the need should arise. Power back up is being analyzed to ensure that lighting, computers, computer network, phones and the phone system survive power failure.

Technology Overview

☎ **Computer network.** InfoLink is co-located with the Crisis Clinic of the Peninsulas on the Kitsap Mental Health campus and is part of the KMHS computer network. KMHS' main software is proprietary and utilizes a UNIX operating system. KMHS also employs a windows network that is primarily used for security and file storage and an Exchange Server 2003 for email communications. KMHS does not have a SQL server within their network.

The Crisis Clinic/Information and Referral system operates on an 8-year old Micron server (Dual PIII 866, 256 Mb SDRAM and 27 GB storage) that runs NT 4.0. In anticipation of using the new Resource House database and our 2-1-1 call center's

eventual departure from the KMHS campus, the purchase of a SQL server is recommended. Additional needs include related SQL software, 3-year maintenance contract, training for the Information Systems (IS) staff and ongoing IS support. Quotes range from \$6,000 to \$11,000. (*See network specifications below*)

Preferred System:

System server: robust SQL server

Total for server: \$11,078.36 (including software and 3 year maintenance)

Server Hardware:	\$ 6,520.55
SQL Server Software:	3,675.15
Tax:	832.16
Shipping & Handling:	50.50
Total Price:	\$ 11,078.36

Server details:

Base Unit:	3.0GHz/1MB Cache, Xeon, 800MHzFront Side Bus for PowerEdge 2850 (221-5963)
Processor:	3.0GHz/1MB Cache, Xeon, 800MHzFront Side Bus 2nd processor for PowerEdge 2850 (311-3942)
Memory:	2GB DDR2 400MHz (2X1GB) Single Ranked DIMMs (311-3590)
Keyboard:	Standard Windows Keyboard,Gray (310-1676)
Monitor:	Dell E173FPB,Digital Flat Panel Monitor, 17 inch (17 inch Viewable), PE/PESC (320-3969)
Video Memory:	Riser,ROMB,PCI-X,PE2850 (320-3977)
Hard Drive:	73GB,U320,SCSI,1IN 10K,PE2850 (341-1305)
Hard Drive Controller:	Embedded RAID - PERC4 Embedded Integrated (341-1506)
Floppy Disk Drive:	1.44MB Floppy Drive (341-1308)
Operating System:	W2K3 Server Standard Edition, 5 Client Access Licenses, English for PowerEdge (420-4042)
Mouse:	Logitech PS/2 2-button Mouse with Scroll, PowerEdge (310-4405)
NIC:	Dual On-Board NICS ONLY (430-8991)
TBU:	PV100T DAT72 w/39160 card for PE2850 (341-1370)
CD-ROM or DVD-ROM	24X IDE CD-ROM (313-2700)
Sound Card:	Bezel for PE2850 (313-2693)
Speakers:	2+4 Split Backplane Daughtercard (311-3951)
Documentation:	Electronic Documentation and OpenManage CD Kit, PE2850 (310-5474)
Additional Storage:	73GB,U320,SCSI,1IN 10K,PE2850 (341-1305)
Factory Installed Software:	Veritas Backup Exec Server and Workgroup Protection Suite (420-5221)
Feature	MR1R5, ROMB RAID 1/RAID 5 Drives attached to PERC4ei PE2850 (341-1363)
Feature	Rack Chassis w/Versarail RoundHole-Universal for 3rd-party racks, PE2850 (310-5465)
Service:	Premier Enterprise Support - Gold - Advanced Software Support Quantity 3 Resolutions (950-0117)
Service:	Premier Enterprise Support Service Gold Welcome Letter (310-3785)
Service:	Premier Enterprise On Demand Engineer Dispatch Severity 1 Three Years (970-0237)
Service:	Type 2 Contract Same Day 4HR Parts and Labor On-Site Response,Initial Year (902-4600)
Service:	Type 2 Contract Same Day 4HR Parts and Labor On-Site Response,Two Years (902-3262)
Service:	Premier Enterprise Support - Gold - Premium Services, 3 Years (902-7352)
Installation:	On-Site Installation Declined (900-9997)
Misc:	Redundant Power Supply With Straight Cords,No Y-Cord PE2850 (310-5463)
Misc:	73GB,U320,SCSI,1IN 10K,PE2850 (341-1305)
Misc:	73GB,U320,SCSI,1IN 10K,PE2850 (341-1305)
Misc:	73GB,U320,SCSI,1IN 10K,PE2850 (341-1305)
Misc:	DAT72,Formatted Tape Media Cartridge,5 Pack (341-0752)

Server software and accessories:

Product	Quantity	Unit Price	Total
SQL Server 2000 Standard Edition-Open Business License Program (960160)	1	\$602.95	\$602.95
SQL Svr Standard Edtn 2000 English CD N 228-01265 (A0100953)	1	\$23.95	\$23.95
SQL 2000-Open Business License Program CAL (960165)	20	\$132.95	\$2,659.00
Windows 2003 Server-Open Business License Program (A0103344)	15	\$25.95	\$389.25

Workstations. InfoLink and Crisis Clinic staffs' desktop workstations are owned by Kitsap Mental Health Services and include four PIII 1000, 256 Mb SDRAM, 20 GB storage computers running Windows XP Pro. The InfoLink and Crisis Clinic systems are using Office 2000 Pro and a "home grown" Access database. In general, desktops at KMHS run from Windows 2000 to Windows XP.

Prior to 2-1-1 implementation, new workstations will be purchased and will include Office 2003. WIN 2-1-1 will underwrite the cost of the Resource House database software, licensing and related technical training. Costs range from \$3,250 to \$8,562 each for 5 fully-loaded workstations. Final decisions will be made at the call center level.

Preferred Workstations:

Workstations (5@\$ 1256.80):	\$ 6,284.00
Tax:	508.25
Shipping & Handling:	275.00
Total Price:	\$ 7,067.25

Workstation details:

Base Unit:	Dimension 4700 Series,Intel Pentium 4 Processor 520 with HT Technology (2.8GHz) (221-5225)
Memory:	512MB DDR2 SDRAM at 400MHz (311-3621)
Keyboard:	Dell Quiet Key Keyboard (310-1582)
Monitor:	17 in (17.0 in viewable) 1704FPt Digital Flat Panel Display (320-4024)
Video Card:	128MB PCI Express x16 (DVI/VGA/TV-out) ATI Radeon X300 SE (320-3873)
Hard Drive:	80GB Serial ATA Hard Drive (7200RPM) (341-0883)
Floppy Disk Drive:	3.5in Floppy Drive (340-8860)
Operating System:	Dimension Dell Support (412-0721)
Operating System:	Image Restore (412-0688)
Operating System:	Dell Owners Manual installed on your system,click on icon after system set-up to access (463-2282)
Operating System:	Microsoft Windows XP Professional,Service Pack 2, English (420-4838)
Operating System:	Windows Media Player 10 (420-4927)
Mouse:	Dell USB Optical Mouse (310-4037)
NIC:	Intel Pro 100M Integrated PCI NIC Card (430-0412)
Modem:	No modem requested for Dell Dimension (313-3607)
TBU:	Adobe Acrobat Elements 6.0 (412-0704)
CD-ROM or DVD-ROM Drive:	16X DVD ROM and 48X CDRW (313-2438)
CD-ROM or DVD-ROM Drive:	PowerDVD Software Decoding forDVD Drives (420-5079)
Sound Card:	Integrated Audio (313-2758)
Speakers:	Dell A425 Speakers (313-3213)
Bundled Software:	No Productivity Software requested (412-1397)
Factory Installed Software:	No Virus Protection Requested (461-8389)
Feature	Music Match 9.0 Basic 7 day OnDemand (412-0741)
Feature	Paint Shop Photo Album 5.1 Standard (412-0744)
Service:	Type 3 Contract - Next Business Day Parts and Labor On-Site Response, 2YR

Service: Extended (950-1392)
Service: Technical Support, 2 Year Extended (950-5462)
Service: Technical Support, Initial Year (960-6380)
Service: Type 3 Contract - Next Business Day Parts and Labor On-Site Response, Initial Year (960-6230)
Dirline: Gold Technical Support ServiceDimension, 3 Years, 1-866-876-3355 (DELL) (960-0478)
Dirline: GTS,Personal Systems,TechnicalSupport Letter (461-3749)
Misc: No Internet Service Provider Requested (412-0148)
Misc: DELL/MY WAY HOME PAGE (412-0670)
Misc: Quickbooks 2005 Special SimpleStart Edition (420-5136)

☎ **Statewide network.** WIN 2-1-1 is developing a statewide VoIP network that will reduce costs, route voice traffic between call centers and allow for the quick re-routing of calls to another call center in another part of the state in the event of equipment problems, service problems or disaster. WIN 2-1-1 is also exploring collaboration with 2-1-1 systems in other states for survivability during disasters. The UCN system currently under consideration and state phone system will be a Win 2-1-1 expense in addition to other costs associated with implementation, such as software, installation and technical training.

☎ **Internet connection.** Crisis Clinic volunteers do not have Internet access, although InfoLink staff access the Internet using KMHS connectivity directly to the backbone (funded by Peninsula Regional Support Network).

All Crisis Clinic and information and referral systems are connected to the Crisis Clinic server, and the KMHS network that uses CAT5 wiring. This equipment is behind the KMHS firewall for security. All offices have multiple wall-mounted data and voice ports that allow for quick setup, configuration and expansion.

New high-speed internet¹² service (unless an MOU between 2-1-1 of the Peninsulas and KMHS is in place to continue with the current connection) will be necessary. If a separate connection is needed, expenses associated with this service will be incurred, including installation, routers, security, monthly fees and maintenance fees. Cost related to network cabling and switches would need to be quoted after an on-site assessment.

Net tracking and spyware software would be needed to protect against spyware and/or inappropriate use of the internet.

¹² High-speed DSL or provisional T-1 is preferred.

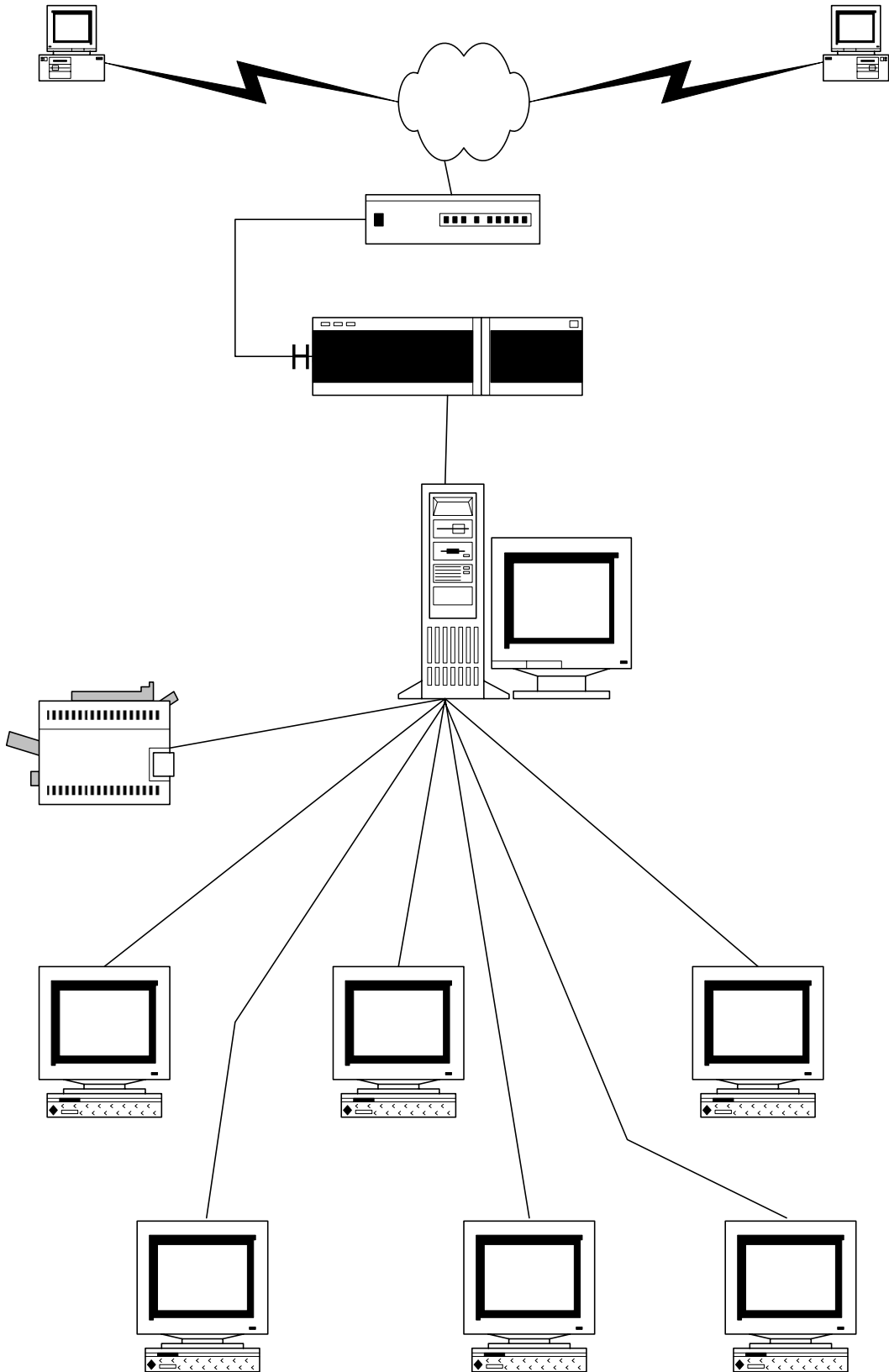
☎ **Security.** KMHS has rigorous procedures in place to protect the system in case of a disaster or malicious attack. In addition to the firewall, all systems are configured with Symantec's anti-virus software Corporate Edition to detect any viruses that might infect the machines. The DAT files for Symantec are checked for updates daily and files are downloaded to all the machines as part of an automated system. Symantec's email security is used to scan all incoming and outgoing email. KMHS employs Role Based Security and requires strong passwords.

As we move forward, IS staff will implement similar processes for 2-1-1 based on our hardware purchases. IS staff at KMHS is highly qualified and have the experience and capability to expand and maintain capacity in both telecommunications and technology for United Way 2-1-1 of the Peninsulas.

☎ **Data Backup.** Kitsap Mental Health currently uses Veritas Backup Exec software to backup data (a feature of proposed hardware for 2-1-1). Because the Crisis Clinic/InfoLink server is connected to the KMHS network, the server is included in the master KMHS backup. A full backup is run on a daily basis using a tape rotation schedule. All tapes are stored in a safe at an off-site location. The KMHS server is connected via UPS that can support the system for approximately two hours.

2-1-1 of the Peninsulas will have a stand-alone server, potential broadband connection, phone system and databases. We will rely on Kitsap Mental Health Services IS department to ensure the same backup reliability that is currently available in their system.

(Please see network graphic on next page)



Internet

Firewall

Router

Public Education Strategy

Public Education Strategy Overview

As a new social utility, 2-1-1 will be presented to communities throughout our three-county region in a clear, concise manner, building on InfoLink's established reputation as the provider of comprehensive information and referral services for the Kitsap and Olympic Peninsulas.

Brand Principles

The 2-1-1 service for Kitsap, Clallam and Jefferson Counties; program will be named and referred to as United Way 2-1-1 of the Peninsulas. WIN 2-1-1's statewide Communications and Marketing Committee is collaborating with the national 2-1-1 marketing program to achieve a uniform message that can be delivered throughout Washington's 2-1-1 call centers. The national 2-1-1 logo will be used on marketing pieces to reinforce the relationship with the national movement and to give added credibility to the quality of the services offered to the public.

Key Public Relations Strategies

Listed below are the strategies that we will employ to rollout our 2-1-1 public education campaign:

- ☎ **Coordination with WIN 2-1-1 State Plan.** WIN 2-1-1 will develop and coordinate a sustained statewide public education campaign about the availability of 2-1-1. Because the Seattle media outlets are available through much of the state, and because our system will not launch simultaneously with some other regions, it is imperative that we work closely with our local media to prevent confusion regarding the future launch of United Way 2-1-1 of the Peninsulas. At the same time we must leverage the WIN 2-1-1's campaign so that it ultimately has significant impact on our regional rollout.
- ☎ **2-1-1 of the Peninsulas general public education rollout.** A mass-marketed publicity campaign will be synchronized among the regional partners: United Way of Kitsap County, United Way of Clallam County and United Good Neighbors of Jefferson County. This campaign will be designed to leverage the statewide plan while eliminating confusion on the peninsulas regarding which counties have 2-1-1 service at the time WIN 2-1-1 launches its public education. Our primary audience will be the general public rather than a specific sector. Media outlets to be used include print (newspapers, newsletters, church flyers and other printed material), radio (to the extent that this is feasible within the region) and cable television. We believe a significant effort must be made to reach all of the general public, especially those who live in the remote areas of the three counties. Our Census data indicates that many of our communities' lower income families in the Northwest reside outside the urban centers. Our 2-1-1 Advisory Committee will leverage the contacts we have with local media to facilitate a successful campaign.

The overall goal is to build public awareness of 2-1-1 as evidenced by a significant increase in calls to 2-1-1 of the Peninsulas. Key awareness messages will include:

- Focus on *getting help* with an emphasis on linking people to health and human service providers;
- Focus on *giving help* by linking people to agencies that use or place volunteers;
- Help is available 24/7/365; and,
- Distinguishing 2-1-1 from other “N-1-1’s”.

☎ Public education for targeted audiences. InfoLink has an established visibility within the human services community. We intend to build on that visibility through developing new written materials and change and improve the appearance of our website to reflect the new program name and include an improved user satisfaction evaluation tool. In addition, we will distribute collateral materials including business cards and press kits. We will coordinate with local government, businesses, chambers of commerce, hospitals and others to guarantee broad distribution of 2-1-1 information throughout the region. We will explore partnerships with the cities in the region for including 2-1-1 information in city residents’ utility bills.

Once the 2-1-1 brand identity has been established in the three counties, we will be ready to work closely with strategic partners to create public education campaigns to let people know that the services of our partners can be reached via 2-1-1.

2-1-1 Rollout Strategy

Rollout Strategy Summary

In order to assure that United Way 2-1-1 is able to meet regional human services needs in a timely manner and to ensure coordination with WIN 2-1-1, we will utilize a systematic approach to implementing 2-1-1 on the Kitsap and Olympic Peninsulas. Although InfoLink has been operational for seven years, the transition to 2-1-1 requires a process similar to that which a new call center would undergo. The rollout phases include:

- ☎ Building community partnerships;
- ☎ Developing internal capacity and refining the current structure to accommodate implementation of 2-1-1;
- ☎ Implementation; and
- ☎ Growth and expansion.

Description of Rollout Strategy Phases

- ☎ **Phase 1/ Building community partnerships (2003-2005).** In order to “grow” into a 2-1-1 system, particularly in a multi-county region, it is essential to identify and cultivate important community partnerships. This phase is critical to the ultimate success of 2-1-1. To date, we have:
 - Recruited Planning Committee members from the three-county region;
 - Used 2-1-1 planning tools to build the beginning foundation of the transition from InfoLink to United Way 2-1-1;
 - Conducted educational meetings with community stakeholders, elected officials, media representatives and business leaders;
 - Met with public safety and emergency management officials to discuss how 2-1-1 can support their operations, particularly during man-made or natural disasters; and,
 - Engaged business planning consultants to extrapolate needed data, evaluate socio-economic conditions in the region, and evaluate facilities, staffing, and phone and technology needs in order to create this business plan.

☎ **Phase 2/Building internal capacity (2005).** Future implementation of 2-1-1 on the Kitsap and Olympic Peninsulas is contingent upon upgrades of internal system and evaluation of staffing, facility and technical support needs. Completed tasks include:

- Assessed existing data collection methodology and overall business processes to determine how to streamline and standardize these efforts as they relate to AIRS accreditation and for 2-1-1 purposes;
- Evaluated phone system to determine the best approach for building capacity while creating a stand-alone system and connectivity to the statewide system;
- Analyzed technology needs with an eye on future growth and creating a system that would be adaptable to another site as growth dictates;
- Reviewed existing facilities to determine feasibility of remaining at the current site; and,
- Reviewed staffing requirements and training needs.

A number of capacity building initiatives are already in place as a result of the processes created within InfoLink. Other tasks that must be accomplished prior to implementation include:

- Develop MOU's with specialized information and referral providers and key humans services providers;
- Upgrade computer network including purchase and installation of SQL server and related software;
- Develop MOU for ongoing technical support by Kitsap Mental Health Services' Information Systems staff;
- Purchase 5 computer work stations to accommodate information and referral staff and after-hours volunteers;
- Acquire and install Resource House and train staff;
- Hire temporary staff to allow for updating existing database and transfer of existing and new data to Resource House;
- Upgrade stand-alone phone system as described in Telecommunications and Technology Plan;
- Research funding sources to provide for stability and sustainability of operations;
- Prepare and submit application for AIRS accreditation;
- Secure website design services to make changes in appearance and content of website, providing a 2-1-1 focus and branding;
- Develop and implement public awareness campaign for the region; and
- Develop an evaluation plan for system performance

☎ **Phase 3/ Implementation (2006).** During the last quarter of 2005 and the first quarter of 2006, 2-1-1 of the Peninsulas will have been quietly prepared for transitioning to 2-1-1. The following will comprise the implementation process:

- Acquire sustainable funding to allow 2-1-1 to operate at levels described in the budget and business plan;
- Enhance staffing level to accommodate projected increase in call volumes;
- Coordinate marketing approach with WIN 2-1-1;
- Establish a definite “Go Live” date and rollout publicity campaign;
- Implement a thorough system performance evaluation system in the third quarter of 2006 to secure definitive qualitative and quantitative data to determine weaknesses in the system; and
- Perform due diligence needed for future relocation of call center.

☎ **Phase 4/Growth and Expansion (2007-2010)**

- Make changes or improvements as indicated in the afore-mentioned evaluation process;
- Monitor call volumes and staffing patterns and compare with business plan projections;
- Accomplish relocation of call center based on call volumes and availability of suitable site;
- Evaluate funding strategy and make changes based on real numbers;
- Recruit and retain additional information and referral specialists; and,
- Continue nurturing solid working relationships with emergency management services, public health and other providers of health and human services information to confirm the cost effectiveness of 2-1-1 as a provider of information and referral services.

Key Challenges

Challenges are inherent in the startup of any new endeavor, and we anticipate encountering several. We are fortunate in having already provided information and referral services in our three-county region for several years and having experienced staff that have already achieved AIRS certification. Challenges that we are prepared to face may include:

- ☎ **Transitioning to 2-1-1 during a time when financial resources are often limited and very competitive.** A significant increase in funding will be needed to support the human capital and technology and equipment needs of the new system. Population growth and demographics in the region over the next five years will be the primary influence on call volume which in turn impacts the overall cost of our operation. Funding from state and federal sources will greatly enhance our ability to provide first-class service to the population in our service area. We anticipate financial support from United Way will continue to be available. Because of the uncertainty of other sources of funding, such as county, city or foundation support, we will expect to have an approach that will allow us to scale our development to the appropriateness of funds available without compromising the quality of service, the expectations of the public or the ability to gain additional support.
- ☎ **Maintaining a quality existing service while focusing on the implementation of 2-1-1.** We recognize that in order for 2-1-1 to succeed in our region, we must continue to nurture our existing information and referral system to maintain the quality service our callers have come to expect. Purchase and installation of new equipment and related training will impact staff as they perform their daily tasks. We will work to ensure staff and volunteer needs are a high priority during the transition period. With a well-planned rollout and marketing effort, our systems and staff should be ready for the challenge.
- ☎ **Securing expanded public support for long-term sustainability.** Much has been done by WIN 2-1-1 to guarantee adequate state and federal dollars to assist with implementation costs. We will need to foster strong relationships with city and county governments in our region. One way of “proving” the value of 2-1-1 is to use last year’s national cost benefit analysis and the July 2005 analysis for Washington State. 2-1-1’s ability to produce timely, accurate reports regarding health and human service needs in the community will also help substantiate the value of 2-1-1 service.
- ☎ **Encountering a diminishing number of social service organizations to which callers can be referred.** Due to funding gaps, some social service agencies are finding it difficult to provide adequate services to meet the growing demand. Even though many Washingtonians have left the welfare roles, they have joined the ranks of the “working poor”, with inadequate or no health care, limited access to safe, affordable child care, limited affordable housing and a myriad of other unmet needs.

The challenge for 2-1-1 of the Peninsulas will be linking people to services at a time when services are declining. 2-1-1’s success will be largely contingent upon the

social service system to meet the increased demand for service as a result of the improved access through 2-1-1.

☎ **Adapting to ongoing changes in telecommunications and technology.** With a new phone system and computer network, InfoLink of the Peninsulas will be well positioned for 2-1-1 implementation mid year in 2006 and participation in the statewide system. Ongoing advances in telecommunications and technology may drive the new equipment into obsolescence. Therefore, it will be contingent upon the local call center to research and seek private funding for upgrades when the need arises.

☎ **Educating the public on the appropriate use of 2-1-1.** People like to try new things, and we anticipate that initially many misguided calls may be received. Public education efforts must provide clear and concise information regarding 2-1-1's purpose to reduce the number of 3-1-1, 4-1-1 and 9-1-1 calls that we receive. We will develop protocols with 9-1-1 centers for the re-routing of misplaced calls.

Initial and ongoing public education efforts will necessitate the involvement of our key partners in helping enhance the public visibility of 2-1-1.

Financing of 2-1-1

Financing Need

United Way of Kitsap County provided full funding support to InfoLink from its inception in 1998 until 2003 when Clallam County residents began accessing InfoLink for information and referral purposes. At that time, United Way of Clallam County became a contributing partner. With the transition to 2-1-1 and the formalization of United Good Neighbors of Jefferson County as a partner, we expect the three organizations will contribute a total of about \$69,000 during the first year of 2-1-1 operations. A grant of about \$14,600 from the Employees Community Fund of Boeing will help support some of the pre-implementation costs of our 2-1-1 system. A large amount of additional funding is needed in the ensuing years to support infrastructure and staffing needs. The needs include phone system, new server, software, computer work stations, staffing for transfer of the Access database to Resource House and funds for staff development and AIRS accreditation.

Financing Strategy

The successful development and implementation of 2-1-1 is largely dependent upon the shared commitment of United Ways in the Kitsap-Olympic Peninsula region, government at all levels and community partners. Some of our assumptions include:

- ☎ The support of state and local government 2-1-1 based on local contribution decisions. The goal is for 2-1-1 to be recognized and funded as part of the basic community service infrastructure.
- ☎ Utilizing local government, United Way and private donor funding to leverage federal, state, corporate and foundation grants.
- ☎ The inclusion of 2-1-1 in government's overall planning so that 2-1-1 can provide support as part of emergency services/disaster/homeland security response, public health and human services.
- ☎ 2-1-1 will receive homeland security and bio-terrorism consideration and support and will consider 2-1-1 as the public communication aspect of these initiatives or operations.
- ☎ 2-1-1 call centers will continue to work cooperatively with WIN 2-1-1 to secure ongoing state funding.
- ☎ United Way 2-1-1 of the Peninsulas will work toward the passage of the federal legislation, "Calling for 2-1-1" and the subsequent request for special appropriations.
- ☎ We will begin preparing grant applications for government and institutional funding for the 2006 funding cycle.

- ☎ Leveraging savings that 2-1-1 creates for state and local emergency management.
- ☎ Government will examine how full funding of 2-1-1, including its online database, can be integrated cost-effectively into programs targeting specialized populations, (i.e. homeless, youth and family, juvenile justice, etc.), rather than duplicating these functions.

Call Volume Projections

Current Year Actual Calls

Region Covered Kitsap/Olympic Peninsulas
Population 332,400
Number of Calls 2,283
When will the I&R receive 2-1-1 calls? Year 1

Estimated Volume at Year 3

Percent of Population Calling 2-1-1 9.0%
Year 3 Max Call Volume 29,916
Year 4 and Year 5 Growth 5.0%

Call Volume Increase by Year

	2006	2007	2008	2009	2010
Percentage Increase	20%	50%	100%	105%	110%
Numeric Increase	5,983	14,958	29,916	31,412	32,982

Budget Projections

Expenses by Service and Support Area

<i>For year ending (\$)</i>	2006	2007	2008	2009	2010
Personnel					
Personnel Salaries	157,680	213,025	243,601	255,251	266,521
Benefits	44,150	59,647	68,208	71,470	74,626
Training & Certification	2,900	3,950	4,437	4,521	4,589
Total Personnel	<u>204,730</u>	<u>276,622</u>	<u>316,246</u>	<u>331,242</u>	<u>345,736</u>
Telecommunications					
PSTN Lines	5,450	7,306	10,203	10,479	10,767
Translation Services	1,436	3,590	7,180	7,539	7,916
Bandwidth (e.g. T1)	2,400	2,400	2,400	2,400	2,400
Total Telecommunications	<u>9,286</u>	<u>13,296</u>	<u>19,783</u>	<u>20,418</u>	<u>21,083</u>
Software and Technology					
Web Hosting	255	255	255	265	265
Other Database/Software Support	1,500	1,500	1,500	1,500	1,500
Software Licensing	1,284	1,284	1,284	1,284	1,284
Total Software and Technology	<u>3,039</u>	<u>3,039</u>	<u>3,039</u>	<u>3,049</u>	<u>3,049</u>
Marketing					
211 Public Education Campaign	16,620	25,000	20,000	15,000	10,000
Outreach Events	8,000	8,000	8,000	8,000	8,000
Newsletters	10,000	10,000	10,000	10,000	10,000
Total Marketing	<u>34,620</u>	<u>43,000</u>	<u>38,000</u>	<u>33,000</u>	<u>28,000</u>

<i>For year ending (\$)</i>	2006	2007	2008	2009	2010
Administrative Costs					
Office lease	4,440	4,440	4,440	8,880	9,146
Travel: Local	1,662	1,662	1,662	1,662	1,662
Insurance	3,100	3,100	3,100	3,100	3,100
Audit	420	420	420	420	420
Office Supplies	1,044	1,422	1,597	1,627	1,652
Utilities	696	948	1,065	1,085	1,101
Printing & Postage	5,000	5,000	5,000	5,000	5,000
Directory Printing	10,000	10,000	10,000	10,000	10,000
Dues & Subscriptions	200	200	200	200	200
Repairs & Maintenance	89	89	89	178	183
Contingency	2,606	3,452	3,866	3,976	4,081
Total Administrative Costs	<u>29,257</u>	<u>30,733</u>	<u>31,439</u>	<u>36,128</u>	<u>36,545</u>
Total Expenses	<u>254,281</u>	<u>339,409</u>	<u>380,934</u>	<u>391,685</u>	<u>401,949</u>

Reference

Total Full-time Employees (FTE's)	5.8	7.9	8.9	9.0	9.2
Transition Costs: Total one-time investments	60,865	8,125	48,125	42,125	2,000

One-Time Investment Needs to Transition to 2-1-1 Service at the Local Level

Component	Needed?	Cost	Times	Total Cost
Training and Certification				
Training (2-1-1-related)	<input checked="" type="checkbox"/>	\$1,500	3	\$4,500
Certification	<input checked="" type="checkbox"/>	\$500	3	\$1,500
Total Training and Certification				<u>\$6,000</u>
Office Expansion				
Build Out (cost/sf; sf)	<input type="checkbox"/>	\$130	600	\$78,000
Furniture	<input type="checkbox"/>	\$1,200	5	\$6,000
Workstations	<input checked="" type="checkbox"/>	\$1,300	5	\$6,500
Total Office Expansion				<u>\$90,500</u>
Telecommunications				
Phone System: Installation, Training/Maintenance	<input checked="" type="checkbox"/>	\$8,400	1	\$8,400
Total Telecommunications				<u>\$8,400</u>
Software and Technology				
Web Enhancement	<input checked="" type="checkbox"/>	\$5,000	1	\$5,000
SQL Server, Installation, Training	<input checked="" type="checkbox"/>	\$11,078	1	\$11,078
Internet install, router,cable,switches, maintenance	<input checked="" type="checkbox"/>	\$2,500		\$2,500
5 work stations & Software	<input checked="" type="checkbox"/>	\$8,562		\$8,562
Total Software and Technology				<u>\$27,140</u>
Capacity Planning				
Travel	<input checked="" type="checkbox"/>	\$1,000	10	\$10,000
Outside Consulting	<input checked="" type="checkbox"/>	\$10,000	1	\$10,000
Total Capacity Planning				<u>\$20,000</u>
Referral Database				
Database conversion	<input checked="" type="checkbox"/>			\$4,200
Total Referral Database				<u>\$4,200</u>

Marketing				
Branding Development	<input checked="" type="checkbox"/>	\$5,000	1	\$5,000
Total Marketing				<u>\$5,000</u>
Total Transition Investments Over the 5 Year Period				<u>\$161,240</u>

Funding Sources - 2-1-1 of the Peninsulas

<i>For year ending (\$)</i>	2006	2007	2008	2009	2010
Federal: Government Grants	40,000	40,000	50,000	75,000	100,000
State Legislative Appropriation	80,000	80,000	80,000	125,000	100,000
County/City/Local: Government Grants	17,500	17,500	35,000	50,000	50,000
KMHS in-kind Donations (salaries & facilities)	93,754	135,583	146,557	-	-
Fund Raising, Contributions & Sponsorships	25,000	25,000	40,000	75,000	75,000
United Way (Kitsap, Clallam, Jefferson)	69,000	71,070	73,202	75,398	77,660
ESHB #2163 Local Funding	30,000	30,000	30,000	40,000	40,000
Fees for Service, Contracted Services			20,000	30,000	30,000
Total	<u>355,254</u>	<u>399,153</u>	<u>474,759</u>	<u>470,398</u>	<u>472,660</u>

Appendix A: Leadership

Qualifications of Key Staff

Riki Jacobs

☎ Name: Riki Jacobs

☎ Experience: Riki has worked in the Crisis Clinic, a program of Kitsap Mental Health Services, since 1980. Her first position was that of Crisis Clinic Coordinator. She has served as supervisor of the Crisis Clinic for many years. She and representatives of several other organizations in Kitsap County provided a major role in facilitating the development of the InfoLink database from the existing crisis clinic database.

A resident of Kitsap County for over 27 years, Riki began her career as a grant writer and cultural specialist for the Kitsap County Indian Center. She is married with five adult children and six grandchildren. Riki provides overall supervision to the Crisis Clinic volunteers and the current staff.

To date, her professional and academic accomplishments include:

- Bachelor's Degree, Human Services, Western Washington University, 2002.
- Certified Information and Referral Specialist, AIRS, 1999-2008.
- Master's Degree, Human Development, specializing in bi-culturalism, Pacific Oaks College, 2005.

Cyndi Foye'

☎ Name: Cyndi Foye'

☎ Experience: Cyndi has worked for United Way InfoLink since January 2003. Prior to her current position, she had been a Crisis Clinic volunteer from 1999 to 2003. She has also worked as an office manager and a computer analyst. Other volunteer work included service as an EMT with a local fire district. In addition to information and Referral duties, Cyndi also oversees maintenance of the shared

InfoLink/Crisis Clinic database.

Her professional and academic achievements include:

- Bachelor's Degree, Human Services, Western Washington University, 2002.
- Certified Information and Referral Specialist, AIRS, 2003-2007.
- Certified Resource Specialist, AIRS, 2004-2006.

United Way 2-1-1 of the Peninsulas Advisory Committee

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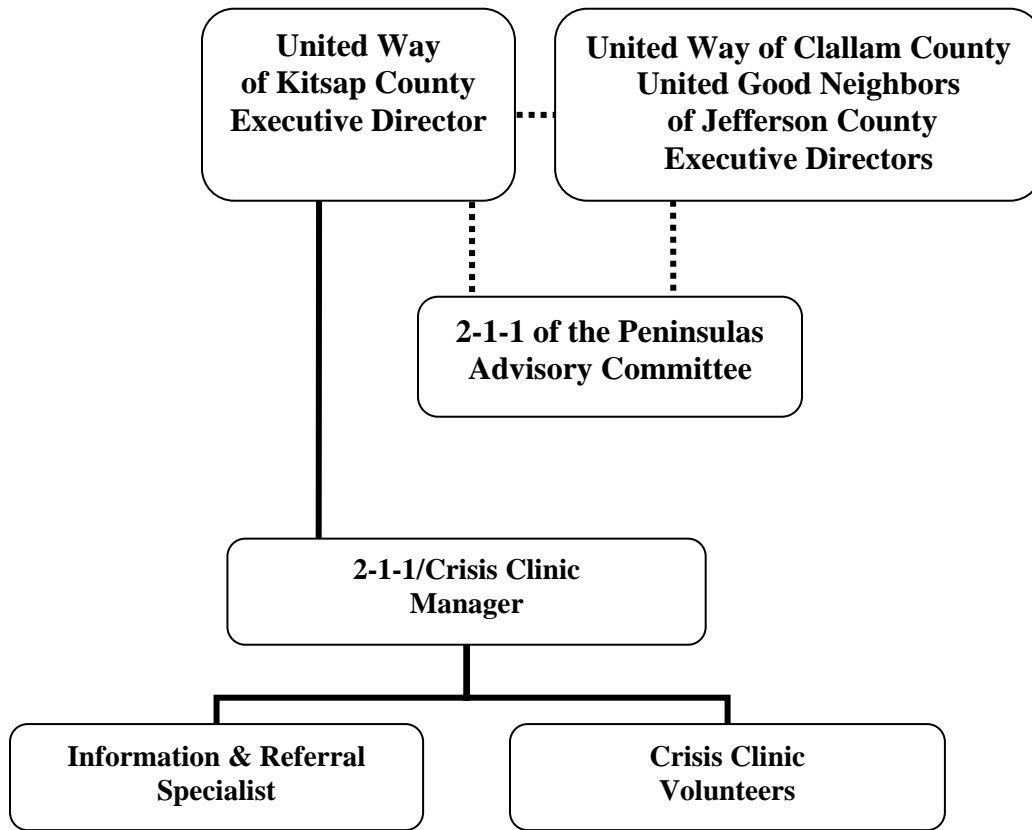
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United Way 2-1-1 of the Peninsulas Organizational Chart



Note: United Way of Kitsap County is the fiscal agent and supervisor for 2-1-1 of the Peninsulas. UWCC and UGN are contributing agencies, but not primary funders. The Advisory Committee consists of individuals from the three-county region.

Appendix B: Washington State 2-1-1 Status

WIN 2-1-1 Overview

Washington Information Network 2-1-1 (WIN 2-1-1) is dedicated to creating linked, comprehensive I & R service for Washington State. WIN 2-1-1's vision is to provide

- ☎ Washington state residents with a single, easy-to-use phone number by which they can obtain information on health and human services;
- ☎ Accurate and specific information on local resources contributed by community agencies that also have access to state and national information; and,
- ☎ Access to a standardized health and human services database via the Internet.

WIN 2-1-1 members will be providing I & R in their communities under the leadership of United Ways, government agencies, other non-profits and special interest groups. WIN 2-1-1 has designated 8 regional call centers to serve all the residents of Washington State. WIN 2-1-1 is building a seamless system to expand access to information and referral across the state and assuring connectivity to 2-1-1 on a national basis.

Progress toward 2-1-1 System Development

Strong leadership, cooperation and collaboration have been pivotal to the success to date in the development and implementation of 2-1-1 in Washington State. Successes in 2004 and 2005 include:

- ☎ WIN 2-1-1 supported local business planning efforts by providing technical assistance.
- ☎ Five of six call centers completed the application and review process and have been designated as 2-1-1 providers. The remaining call center has nearly completed the process.
- ☎ Executive Director Tom Page has served as co-chair of the National 2-1-1 Assembly which has created supportive relationships with national, state, and local 2-1-1 efforts. This in turn has provided ready access to materials and resources from across the country.
- ☎ A state Network of Call Center Directors have been meeting to provide further coordination and consistency among communities as the state moves toward implementation.
- ☎ Funding from the Verizon Foundation allowed for a 2-1-1 cost-benefit benchmark study to assure that our system has reliable baseline data and metrics to document our progress.

- ☎ The Win 2-1-1 Technology Committee has performed extensive due diligence to arrive at a system that will assure seamless phone access to 2-1-1 services for all Washington residents.

Advocacy and Outreach

- ☎ Through coordination with individuals and partner agencies, WIN 2-1-1 successfully secured \$1,000,000 in state capital funding.
- ☎ WIN 2-1-1 continues to work with partners to strategize for securing funding for operating support for 2-1-1.
- ☎ The majority of the state's Congressional delegation has agreed to co-sponsor the Calling for 2-1-1 Act. WIN 2-1-1 will be pursuing a special appropriation for operating support for 2-1-1.

Resources

WIN 2-1-1's fundraising efforts have been hugely successful. Highlights include:

- ☎ Employees Community Fund (ECF) of Boeing grant for \$100,000 to support business planning;
- ☎ \$255,000 in funding raised to match ECF challenge grant of \$211,000;
- ☎ \$20,000 from Safeco for Spokane business planning and development; and,
- ☎ Over \$375,000 in grant support in the past year.

Appendix C: National 2-1-1 Background

Origin

In 1996, the United Way of Metropolitan Atlanta was gifted with telecommunications equipment that had been used by a local for-profit information service using a three-digit phone number. This gift inspired the transformation of the United Way's information and referral program and the creation of the United States' first 2-1-1 Center. In May 1997, the Georgia Public Service Commission assigned 2-1-1 to the United Way of Atlanta as a simple, easy-to-remember number for Georgians to call to either get or give help within the 13 counties of metro-Atlanta.¹³

Historic Milestones

After Atlanta's success, a grassroots effort began to plan and develop a national 2-1-1 system. Key events leading up to the National 2-1-1 Initiative included:

- ☎ Creation of the National 2-1-1 Collaborative;
- ☎ Implementation of the first statewide 2-1-1 service in Connecticut;
- ☎ Grant of \$45,000 from the Dammann Fund to advance the 2-1-1 concept;
- ☎ Establishment of accepted National 2-1-1 Standards;
- ☎ Introduction of federal legislation supporting the 2-1-1 assignment;
- ☎ Securing the assignment of the 2-1-1 dialing code from FCC;
- ☎ Creation of the AIRS?UWA Council;
- ☎ Implementation of 2-1-1 in other states including Florida, Georgia, Louisiana, Tennessee and Texas; and
- ☎ Creation of the National 2-1-1 Coalition.

Leadership

Leadership for National 2-1-1 Initiative comes from the **Alliance of Information and Referral Systems**, which has a membership of nearly 900 I & R providers, mostly in North America and **United Way of America** which supports 1,400 member United Ways by helping them pursue the dual strategies of community building and conducting cost-effective fund raising.

¹³ Interestingly, although not gifted with startup telecommunications equipment, United Way InfoLink was also started during the same time frame as the Atlanta project.

Appendix D: N-1-1 Overview

Among the Federal Communication Commission’s abbreviated dialing arrangements, N-1-1 codes are three digit codes of which the first digit can be any digit other than one or zero, and the last two digits are both one. N-1-1 codes “0-1-1” and “1-1-1” are unavailable because “0” and “1” are used for switching and routing purposes. Hence, there are only eight possible N-1-1 codes, making N-1-1 codes among the scarcest of numbering resources. The following chart outlines the existing N-1-1 code assignments:

N-1-1 Code	Assignment
2-1-1	Assigned for community information and referral services
3-1-1	Assigned nationwide for non-emergency police and other government services.
4-1-1	Unassigned, but used nationwide by carriers for directory assistance
5-1-1	Assigned for traffic and transportation information
6-1-1	Unassigned, but broadly used by carriers for repair service
7-1-1	Assigned nationwide for access to Telecommunications Relay Services (for the hearing and speech impaired)
8-1-1	Unassigned, but used by carriers for business office use
9-1-1	Unassigned, but used nationwide for emergency services

Appendix E: Cost/Benefits to a National 2-1-1

Summary

Researchers have estimated¹⁴ the benefits/costs of a national 2-1-1 information and referral system from the following perspectives:

- ☎ Participants (individuals and organizations)
- ☎ Taxpayers (arguably the most important perspective for public investments)
- ☎ Society, as a whole

The researchers used four scenarios in their analysis – a mixed model estimate and three single model estimates (centralized, decentralized and hybrid). The principal scenario for estimating more realistic national costs, benefits and net value is the mixed model.

Net value to society is presented as the differences between the benefits accrued and the costs incurred by the participants and taxpayers, less taxes and transfers between them.

Three of the four 2-1-1 models examined provided positive estimated net value to society. Only the single model/*decentralized* system produced a negative impact. The mixed model scenario – which most closely conforms to the current distribution of approaches among states – produces an estimated net value to society of more than \$530 million over ten years in net present value.

2-1-1 Models

- ☎ A *centralized* administration/single call center model - A single call center provides I & R services for the entire state and bears the responsibility for system administration, telecommunications and database management. The net value estimates for society resulting from the *centralized* model scenario supports investing.

The net valued to society of 2-1-1 access approaches \$58 million in the first year. Net value is well above \$490 million over ten years and well over \$432 million discounted to net present value.

¹⁴ *National Benefit/Cost Analysis of Three-Digit Telephone Information and Referral Services- Final Report*; Ray Marshall Center for the Study of Human Resources, December 2004

- ☎ A *decentralized* administration/multiple call center model in which each call center serves a defined substate area and administers service delivery structures and functions independently. The decentralized model scenario, because of its negative net value estimates, should be pursued with caution.

The net value of 2-1-1 information and referral access to society is negative. Costs exceed benefits by nearly \$47 million in the first year and by about \$527 million over ten years when discounted at net present value.

- ☎ A *hybrid* centralized/decentralized call center model in which multiple call centers serve substate areas as in a decentralized approach, but another entity has responsibility for other features of a comprehensive network as in the centralized model. The net value estimates for society under the hybrid model scenario also lend strong support for investing in national 2-1-1 access to I & R services.

The net value to society of national 2-1-1 access approaches \$130 million in the first year alone and nearly \$1.1 billion over ten years when discounted to net present value. The benefit/cost ratio for society is 2.26 over ten years.

- ☎ The mixed model is the principal model in which each state is assigned one of the organizational models. National results are estimated based on combined results of all states operating under the three models simultaneously. Under the mixed model scenario, investing national 2-1-1 access to I & R service is strongly supported by net value estimates.

The net value to society of access to 2-1-1 information and referral approaches \$69 million in the first year, and benefits exceed costs by \$530 million over ten years, discounted to net present value. The benefit/cost ration for society over ten years is 1.36.

Additional Benefits

- ☎ Value of rapid, humane response to individuals and families in need of assistance and basic subsistence. The offer of hope and the speed with which an option or solution can be provided at a time of distress is immeasurable.
- ☎ Value of local collaborations in which 2-1-1 served as the nexus for attracting resources and providers in the community to deliberate and respond to human needs.
- ☎ Value to high school counselors and instructors who use 2-1-1 to identify resources for students.
- ☎ Value of early intervention, particularly in crisis situations involving mental health and suicidal tendencies or in housing assistance that may prevent a spiral into homelessness and destitution.
- ☎ Value of 2-1-1 as a resource for employment entry and retention.

Appendix F: Supporters of 2-1-1

Kitsap and Olympic Peninsulas

Kitsap Community Resources

United Way of Clallam County

Kitsap Legal Services, Inc.

Sound Works Job Center

Kitsap Family YMCA

Holly Ridge Center

Kitsap Mental Health Services

Jefferson Mental Health Services

Jefferson County Commissioners

Kitsap Dept. of Emergency Management

United Good Neighbors of Jefferson County

Interfaith Volunteer Caregivers

Girl Scouts – Totem Council

Catholic Community Services

Clallam County Emergency Management

Peninsula Community Mental Health Center

Olympic Area Agency on Aging

Kitsap Regional Coordinating Council

Kitsap Division of Aging and Long Term Care

Washington State

Bellingham Public Library

Crisis Clinic of King County

Employment Security Department

Healthy Mothers/Healthy Babies

King County Health Department

Northwest AIRS

Puget Sound Energy

Seattle Aging and Disability Services

Senior Information and Assistance of King County

Skagit County Community Action Agency

Washington Dept. of Social and Health Services DSHS Aging and Disabilities

Central Washington Non-Profit Resource Center

Crisis Clinic Resource Network of Thurston/
Mason

Guide Line, Inc.

King County Dept. of Community and Human Services

National Council on Aging – Washington Chapter

RECA Foundation

Seattle Human Services Department

Senior Information and Assistance of Snohomish County

Volunteers of America – Western Washington

DSHS Community Service Div. Region 4

Washington Military Department: Emergency
Management Division

United Ways

United Way of Washington

United Way of Benton and Franklin Counties

United Way of Clallam County

United Way of Cowlitz County

United Way of Grant County

United Way of Island County

United Way of Grays Harbor County

United Way of King County

United Way of Kitsap County

United Way of Kittitas and Skamania Counties

United Way of Lewis County

United Way of Mason County

United Way of Pierce County

United Way of Pullman

United Way of San Juan County

United Way of Skagit County

United Way of Snohomish County

United Way of Spokane County

United Way of Thurston County

Twin City United Way

United Way of Walla Walla County

United Way of Whatcom County

United Way of Yakima County