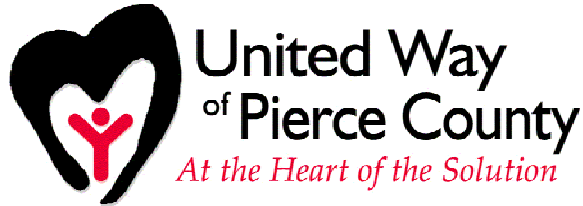


Pierce County 2-1-1

BUSINESS PLAN



APRIL 2006

BUSINESS PLAN

PREPARED BY



THE VALUE OF PIERCE COUNTY 2-1-1: A THREE-DIGIT DIALING CODE FOR ACCESSING CRITICAL HEALTH & HUMAN SERVICES INFORMATION

People looking for help in Pierce County often do not know where to begin. Locating such basic resources as food, shelter, employment, or health care may mean calling dozens of phone numbers, then struggling through a maze of agencies and services to make the right connections. In the health and human services field, we refer to this process as the “social service shuffle,” with clients calling agency after agency without obtaining the help they need. Even when projects promise “no wrong door” for accessing services, navigating the system can be difficult and confusing.

There is, however, a bright spot in this otherwise dark situation – a national effort promises to make access easier through the use of a federally designated telephone number: 2-1-1. This three-digit dialing code was assigned in July 2000 by the Federal Communications Commission for the exclusive purpose of providing widespread access to health and human services through community information and referral systems. It is the national solution to the “social service shuffle.” This number is also designated for connecting volunteers and donors with opportunities to give their time, money, products and services.

Once described as “elegant in its simplicity,” 2-1-1 is an easy to remember phone number linking callers in need to available health and human service programs. Currently, 2-1-1 services are available to over 55% of the United States population through in 38 states. The Washington Information Network 2-1-1 (WIN211) is working to make 2-1-1 a reality for all residents of Washington State. To facilitate service provision for Washington, WIN211 has designated eight call centers to provide services for the various geographic regions of the state. In January 2005, United Way of Pierce County HelpLine, which has been providing information and referral services to Pierce County residents for more than 15 years, was designated the WIN211 call center for Pierce County.

HelpLine works with a network of agency partners to provide high quality, high impact, coordinated health and human services for the Pierce County community. HelpLine is committed to providing the community with access to information and resources that can help individuals and families live healthier, more productive lives. Calls to HelpLine are handled by trained Information & Referral Specialists, who assess callers’ needs, determine available options, referring callers to appropriate programs and services, intervening in crisis situations, and advocating for callers when necessary. Currently, HelpLine is only able to provide services during regular business hours. However, through the WIN211 call center network, Pierce County residents will have access to services 24 hours a day, seven days a week, 365 days a year.

2-1-1 is not a duplication of services. This system is being built on the foundation of the nation’s existing information and referral providers. 2-1-1 does not replace or duplicate services provided by specialized information and referral services (Senior Information & Assistance, Child Care Resource & Referral, Domestic Violence HelpLine, etc.) or other social service providers. Rather, 2-1-1 is a unique opportunity to build an integrated system of services by strengthening the human service system through easier access. When we fully realize our vision, every individual in every community throughout Pierce County will have access to information that can help them lead healthier, more secure, and more productive lives.

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EXECUTIVE SUMMARY

- What is Information & Referral (I&R)?** Information and referral (I&R) gives people in need an easy link to information about local resources. I&R is the link between all community resources and all residents. From the single mother needing food for her children to the senior citizen looking for in-home care, I&R brings people and services together.
- What is 2-1-1?** 2-1-1 is a groundbreaking, efficient solution that eliminates the confusing and often overwhelming maze of information and services for people who need help. This easy-to-remember, three-digit dialing code provides the community with a personal connection to the safety net of social services. 2-1-1 also offers social service providers help for their clients, and gives organizations who are dedicated to providing help a way to enhance their impact and maximize their resources.
- 2-1-1 is also the number to call for those wanting to “give help.” Individuals and groups wanting to volunteer their time connect quickly and easily to the most appropriate service opportunities. Organizations and individuals wishing to donate goods, services, or money can also contact 2-1-1 to connect with nonprofit agencies in need of resources.
- Finally, 2-1-1 collects important data, providing a system to track and report information on emerging needs, trends, and gaps in services.
- What is HelpLine?** United Way of Pierce County HelpLine began providing I&R services in 1991. Since that time, HelpLine has established long-standing working relationships with nonprofit and government organizations throughout Pierce County. HelpLine delivers information and referral services to the community by phone, via our website, and through print publications, connecting people with more than 1500 health and human service programs.
- The HelpLine call center currently takes more than 25,000 calls each year. HelpLine operates five days a week, 8:00 a.m. to 5:00 p.m. The HelpLine page of the United Way of Pierce County website is the most visited page on the site. HelpLine staff are also called upon frequently for educational presentations in the community.
- Why 2-1-1 now?** Residents of Pierce County need help finding resources now more than ever. The idea of coordination and program alignment is not new. In fact, the organizations that are working to deliver 2-1-1 are the same organizations that came together in 1991 and proposed an integrated plan for information and referral services in Pierce County. By 2006, when 2-1-1 is operational, callers will need to remember only one simple three-digit number to connect with the services they need in our community and statewide.
- Structure & Partners** HelpLine is in the unique position of operating as an internal program of United Way of Pierce County. In addition to HelpLine, United Way of Pierce County is also the parent organization of the Volunteer Center and Gifts-in-Kind programs. This set-up has provided HelpLine with a shortcut to many of the relationships other 2-1-1 call centers have built, as HelpLine is already offering both “get help” and “give help” solutions. As the only comprehensive I&R service in Pierce

County, HelpLine has many established relationships with local nonprofit organizations and specialized information and referral providers built on mutual respect, cooperation, and collaboration. HelpLine continues to reach out to local, regional, and state organizations to build new, mutually beneficial relationships and to expand the resources available to the residents of Pierce County.

System Highlights

HelpLine/2-1-1 has emerged as a ubiquitous and valuable social utility – a community-building tool that strengthens social bonds, improves people’s lives, and makes communities stronger and safer throughout our county. The following points highlight the benefits of the 2-1-1 system for Pierce County:

- Innovative response to the demand for critical community information and referral services;
- System-wide efficiency by using the latest technology available to reduce duplication, manage information, and track social service trends;
- More access for more people;
- Clear countywide vision and growth strategy driven by experienced and representative leadership; and
- A system that can play a role in homeland security and emergency/disaster management.

Trends Impacting Demand for 2-1-1

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

- Washington ranks as one of the top five “food insecure” states in the nation, and our unemployment rate is higher than the national average;
- An increasingly older population in our region indicates a mounting demand for health and human services serving seniors;
- The growing cultural diversity of our region challenges service providers’ efforts to effectively serve all of the clients;
- Resources available to nonprofit agencies and community programs are decreasing due to a decline in government and private funding; and
- Many low-income families, who formerly relied on welfare, still cannot make ends meet and continue to rely on health and human service providers to ;

Program Operations

HelpLine/2-1-1 is a complex system of coordinated relationships between social service providers and the community. Through the WIN211 statewide system, Pierce County will have access to 24/7 telephone information and referral, a comprehensive web-enabled database, data collection and reporting about emergent trends and needs, and county-based outreach offices. HelpLine/211 will also provide technical expertise, critical support functions and infrastructure, and serve as a single comprehensive I&R access point for the entire region.

2-1-1 Rollout Strategy

We have undertaken a systematic approach to creating 2-1-1 in Pierce County. The last year has been spent on planning and implementation activities with the statewide network, as well as locally. The next two years are devoted to the successful launch of 2-1-1 and the development of a comprehensive, regional program that has quality, accuracy and customer service at its core. This will require building a strong infrastructure and mutually beneficial community partnerships.

FINANCIAL SUMMARY

Current Funding

We are currently funded to cover an operating budget of approximately \$167,000, obtained from the following organizations:

- United Way of Pierce County
- Bill & Melinda Gates Foundation

Funding Requirements

We require a one-time investment of \$75,300 to accelerate our full transition to 2-1-1. Increasing capacity and building a regional system which has had limited investments and support is critical to the success of 2-1-1. Funding will support infrastructure, staffing, training and database development. With the transition to 2-1-1 complete, our annual operating budget requirements will increase to approximately \$275,000 annually.

Use of Proceeds

Capital will be used to fund:

- **Telecommunications & Technology.** Upgrading technology and increasing capacity for HelpLine/2-1-1.
- **Extended Service Hours.** In order for Pierce County residents to receive 24/7/365 service, HelpLine/2-1-1 will partner with 24/7 call center hubs to handle after hours calls.
- **Public Education.** Execution of our public education and communications strategy and the development of marketing tools.
- **Capacity Building.** Hiring and training at least 2.0 FTE permanent, certified staff in anticipation of dramatic call volume increases corresponding with the implementation of 2-1-1.

Financial Summary

OPERATING BUDGET	2006	2007	2008	2009
Personnel & Benefits	206,570	218,049	228,951	235,820
Occupancy	2,314	7,000	7,210	7,426
Telecommunication/Tec hcnology	12,268	12,000	12,360	12,731
Supplies	3,800	5,000	5,150	5,305
Travel	4,380	4,500	4,635	4,774
Training	2,900	3,500	3,605	3,713
Marketing	12,150	10,000	10,300	10,609
Professional Fees	3,240	1,500	1,545	1,591
TOTAL OPERATING	247,622	261,549	273,756	281,969
FUNDING				
County & City Grants				
United Way	128,590	132,448	136,421	140,514
Project-based Grants	38,100			
All Other				
TOTAL FUNDING	166,690	132,448	136,421	140,514
	80,932	129,101	137,335	141,455
ONE-TIME IMPLEMENTATION COSTS	75,300	0	0	0
TOTAL FUNDING REQUIREMENTS	322,922	261,549	273,756	281,969

ORIGINS & MILESTONES

Origins

In response to concerns expressed by a variety of institutions and the media, United Way of Pierce County formed an Information & Referral Task Force who identified a number of problems with accessing information about community services. Many studies were done regarding human service delivery in Pierce County. Easy access to information about resources was shown to be a primary need and goal. They found it was necessary for people in need to make numerous calls to obtain information about available services while others experienced barriers to accessing services. There was a lack of up-to-date information and a need for a centralized point of contact instead of many smaller, specialized I & R services.

In response these issues, the I & R Task Force recommended that United Way of Pierce County develop and operate a comprehensive, regional information and referral program. United Way HelpLine began taking calls on July 15, 1991.

HelpLine has served as the central information point for Pierce County and the surrounding area. The extensive resource database is available throughout the community by phone, through our print directory, and via the Internet allowing clients to access information in multiple ways, while remaining anonymous. By providing current information, objective assessment and follow-up, HelpLine creates an atmosphere where groups and individuals in need can find services quickly while maintaining their dignity.

When WIN211 approached HelpLine to be the Pierce County 2-1-1 call center, we were honored to have the opportunity to be a part of this unique, comprehensive statewide system.

JERRY/ 2-1-1 CALLER PROFILE

HelpLine/2-1-1 received a call from Jerry, a gentleman in his late forties who had worked a city agency for over 20 years. Recently, his failing health necessitated him quitting his job. His health insurance benefits and savings had been exhausted because of his recent kidney transplant and recovery. While recuperating in the hospital, his home was vandalized and had been lived in by vagrants, who ran up his electric bill and trashed his furniture and appliances. The city condemned his house, because the damages left it uninhabitable, and he was left owing more than \$800 for utilities. When he called us, he was living illegally in his garage during winter weather without power while still trying to recover from major surgery. HelpLine/2-1-1 staff advocated for Jerry and were successful in finding resources to cover his past due utility bill. Additionally, we were able to have damages repaired through local major/minor home repair programs. Through negotiation with the city, the sanctions placed on the dwelling were removed. Volunteers cleaned up his yard, mowed, and hauled away trash. Through local resources, we were able to have most of Jerry's damaged furniture and appliances replaced. We connected Jerry with the discount rate program for TPU and with a program to reduce his property taxes through the County Assessor's Office, so he could afford to remain in his home. Jerry is now safe and secure in his own home, and he is very thankful for HelpLine/2-1-1 and the many contributing agencies in our community.

SYSTEM HIGHLIGHTS

System Highlights

The following points highlight the strength of our system:

- ***Innovative response to the demand for access to critical community information and referral services.*** HelpLine/2-1-1 is a groundbreaking, efficient solution that can eliminate the confusing maze of information and services that often overwhelm individuals who need help. 2-1-1 improves upon existing, decentralized service and offers professionals and organizations dedicated to providing social assistance with a way to enhance their impact and maximize scarce resources. A fully-realized 2-1-1 system for Pierce County has the ability to:
 - Provide an easy-to-remember, accessible entry point to community information and referral services;
 - Provide a single repository where comprehensive data on community services is collected, maintained, and updated regularly, thus saving the costs in duplication of database management efforts annually; and
 - Leverage the existing information and referral infrastructure already in place, while fostering new processes and access to technology, in order to provide service for Pierce County 24/7/365 days per year, which does not currently exist.
- ***Building on a proven service model that requires funding for accelerated growth, not as a start-up investment.*** Since 2-1-1 was first launched in Atlanta in May 1997, the 2-1-1 system has emerged as a widely accepted service model across the country. To date, there are many active 2-1-1 systems that service more than 55% of the population in the United States. We are building on the experience of established I&Rs as well as the 2-1-1 system's proven service model to seek funding for a consolidation of existing information and referral services.
- ***Utilizing technology to reduce duplication, manage information and track social service trends.*** Our system will help to better manage the magnitude of social service program information that must be entered and regularly updated in the HelpLine/2-1-1 database. This same database will generate reports that proactively identify local issues and unmet needs. Policy makers can use this information to better understand emerging and existing social problems and to better allocate city, county, and state resources.
- ***Play a vital role in homeland security and/or serve as a support system for crisis management.*** Once implemented, the 2-1-1 system can be accessed by other organizations that need to disseminate information to broad populations throughout the county. During emergencies or natural disasters, such as floods or earthquakes, the 2-1-1 system can act as a support system to first responders (i.e., Red Cross, FEMA, etc.) by serving as the access point for services, as well as coordinating spontaneous volunteers and donations for local recovery efforts. Serving in this capacity, 2-1-1 frees up valuable staff time that would be spent handling thousands of calls to provide hands-on direct service to those in need of help.

PUBLIC IMPACT & VALUE PROPOSITION

Public Impact

Our plan to fully implement 2-1-1 across Pierce County will have the following impacts on its residents:

- ***Employing high-touch personal interaction when analyzing callers' needs to positively impact their lives.*** Due to the often sensitive and complicated issues faced by callers, 2-1-1 staff will be trained and supervised by Alliance of Information and Referral Systems (AIRS) certified Information & Referral Specialists. Staff will be trained to ask the questions necessary to help identify underlying problems and needs that must be addressed in order for people to live healthy, productive lives. 2-1-1 has the power to change people's lives by connecting them with resources that help them move toward greater self-reliance. Examples include:
 - Aiding senior citizens to find services to help pay for prescription drugs, so they can maintain a healthy, active life;
 - Directing single mothers to affordable child care centers close to home, so that these mothers can keep their jobs instead of relying on welfare;
 - Assisting veterans and families of deployed military to connect with specific resources available to them;
 - Connecting domestic violence victims with a supportive shelter, so these victims and their families can feel safe and secure; and
 - Helping individuals find resources to cope with the financial strain of layoffs so that their families can remain in their homes.
- ***Providing the infrastructure to connect individuals with precise information and social services that address their needs.*** All Pierce County residents can use 2-1-1 to navigate the complex and ever-expanding maze of health and human service providers, nonprofit organizations, government agencies, community service organizations, and their associated programs and services. By creating a brand that becomes synonymous with easy-to-access help, 2-1-1 can not only make it easier but also make it more acceptable to use human service systems. Creating acceptability is critically important today as high levels of unemployment and underemployment have created a totally new consumer group for human services, one neither comfortable with, nor adept at, accessing available assistance. Also, when individuals connect with 2-1-1 first, the number of inappropriate calls to agencies is substantially reduced, thus freeing up agency staff time to provide direct service to clients.
- ***Generating new and useful data that can be aggregated and analyzed at the state and local levels and used by policymakers to improve social services.*** 2-1-1 has the potential to become a social barometer that provides current information on emerging needs and on demand for existing services. As a focal point in the community, the 2-1-1 system will generate information to be used in the development of public policy, evaluation of services, and support advocacy efforts. As a result, this valuable information will contribute to better use of scarce resources, including services funded by tax dollars and through charitable donations.
- ***Enabling Pierce County residents to GIVE help as well as get help.*** 2-1-1 is marketed in most communities across the country as "one number to give and

to get help.” HelpLine/2-1-1 is fortunate to be in the position of already being connected with the local Volunteer Center and Gifts-in-Kind program, two additional internal programs of United Way of Pierce County. The Volunteer Center, which uses a web-based opportunities database, provides a quick, easy way for individuals and groups to connect with available opportunities. The Gifts-in-Kind program connects individuals and businesses with local nonprofits to find good homes for new and gently used products.

- ***Improved access to non-emergency assistance during times of crisis.*** Natural disasters and threats of terrorist attacks are complicated issues that face local emergency management professionals. 2-1-1 can assist during times of crisis by decreasing the volume of calls received by emergency responders and agencies by handling non-emergency requests for information about where to turn for assistance during an emergency and by handling inquiries from spontaneous volunteers and donors.

Value Proposition

2-1-1 provides the right information the right way (i.e. Internet, phone, and print) at the right time. The key benefits of 2-1-1 for Pierce County include:

- Efficiencies created by reducing duplication of services by assisting residents to find appropriate services and preventing calls to the “wrong” service throughout the network of health and human services;
- Ability to track and report gaps in services and use of services; and,
- Availability as a point of public education and awareness in times of emergency and disaster.

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

- Ability to access free and up-to-date information at any time about health and human services, donating, and volunteering;
- Provision of information that is personal to the caller’s situation and specific location;
- Ability to link callers to 2-1-1 call centers in other regions and other states;
- Provision of information delivered confidentially in an environment that is free from judgment; and
- Referral specialists who are able to get to the root of the problem and provide multiple options for callers.

TRENDS IMPACTING DEMAND FOR 2-1-1

Economic & Demographic Trends

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

- ***The need for basic social services is growing.*** Washington is the third hungriest state in the nation and our unemployment rate is higher than the national average. Pierce County also has an affordable housing issue, with many low-income residents paying more than 50% of their income for housing. More working families are accessing basic social services, such as food banks and financial resources to help pay rent and utility bills. Unfortunately, the need for basic health and human services is on the rise and there are no short-term, immediate solutions to the problem.
- ***Increasing demand for culturally sensitive social services and the ability to communicate with non-English speaking callers.*** Pierce County's population is diverse with 22% of its 750,000 residents indicating their racial/ethnic identity as non-white in the 2000 census. Hispanics/Latinos are the fastest growing ethnic group. Pierce County is also home to a number of immigrant/refugee people, including Southeast Asians, Eastern European and African peoples, and it is expected that this immigration will continue.
- ***Demographic changes, such as aging, indicate 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. By 2010, Pierce County's senior population will increase to more than 15% of the population from 12.2% in 2000. If this trend continues, by 2025, nearly 25% of the United States' population will be persons 60+ years. 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 significant impact on the family members and organizations that provide care and support to the elderly. As a result, more resources will be necessary to connect the elderly with the specific help they need.
- ***The decline in state and federal funding directly impacts the ability of nonprofits and community programs to provide needed services.*** As funding levels decrease, nonprofits are asked to do more with less. As unemployment and poverty rates remain high, the need for health and human services increases. This dichotomy makes finding the appropriate resources even more complex. 2-1-1 will assist callers in navigating through the closures, reductions, and changes in existing services.

PROGRAM OPERATIONS

Program Operations Overview

2-1-1 is a service for individuals at all life stages, particularly those in the process of transition or change, in need of information and referrals to the safety net of social services. 2-1-1 also supports service providers by providing quick, easy-to-access information for their clients.

In order to best serve this audience, I&R services will be delivered to the public via phone and the Internet, as well as through print publications. 2-1-1 proactively seeks to establish working relationships with nonprofit and government agencies, to avoid duplication of services and to provide an effective, high quality I&R system for the Pierce County community.

Community Services

HelpLine/2-1-1 will provide the following community services:

- **24/7 information & referral access.** Currently, HelpLine staff are available to answer calls Monday through Friday from 8:00 a.m. to 5:00 p.m. However, 2-1-1 will bring 24/7/365 service to Pierce County residents through the network of WIN211 call centers. HelpLine has a current call volume of 25,000 calls per year, but it is anticipated that implementation of 2-1-1 will cause an increase in call volume of more than 50%. In order to meet this increased need, HelpLine will need to add two permanent staff positions (2.0 FTE) to serve as call center leads. HelpLine will continue to supplement call center staff by using work-study students from local colleges and universities; however, the two permanent staff positions will be necessary to ensure continuity and quality of HelpLine/2-1-1 services. See *Financial Projections* for further information.
- **Database.** HelpLine/2-1-1 is responsible for the compilation of information about health and human services for the Pierce County community. An accurate, localized database of health and human service providers is critical to the successful operation of 2-1-1 and essential for quality 24/7 service provision. The HelpLine/2-1-1 database contains approximately 2200 human service agencies and programs. The database is formally updated twice a year (and updated perpetually as new information is received). Although the phone connection for information and referral services is the most visible aspect of 2-1-1, more and more people are turning to the Internet for researching local resources. The HelpLine/2-1-1 database will be available for those who prefer searching online for help. Visitors may search the database by keywords, zip codes, or agency/program name. Access to the database will be available through the United Way of Pierce County website and the WIN211 website.
- **Data collection and reporting.** As requested, specialized reports will be made available to community planners so they can identify regional trends in social services. 2-1-1 will collect societal impact statistics, such as zip code, needs requests, and the extent to which needs are being met. 2-1-1 will also track various operational and performance statistics, such as call volume, average call length, average wait time to talk with a 2-1-1 representative, and transferred calls, to report as needed.

Infrastructure Services

Internally, HelpLine/2-1-1 provides technical expertise, critical support functions, and a level of system infrastructure. Based on experience and field research, we have identified five services as universal needs required in the provision of effective 2-1-1 services:

- **Quality assurance.** In order to maintain a high quality, professional service, HelpLine/2-1-1 will abide by the national standards established by AIRS, which are required for accreditation. Application for accreditation will be submitted for approval by 2008. Standards governing the quality of call center services cover the following key areas:
 - 2-1-1 service delivery;
 - Database management;
 - Data collection and reporting;
 - Cooperative community relationships; and,
 - Organizational and professional requirements.

In addition, we provide for callers with hearing impairments and foreign language needs.

- **Operations and staffing.** To a large degree, 2-1-1 simply complements our already existing call center services. With 15 years of experience in information and referral, operating policies and procedures are already in place, as well as new staff orientation, training, and continuing education plans, data collection, and quality assurance standards. These policies and procedures will be modified as needed to fit the 2-1-1 statewide system and to comply with AIRS standards and practices.
- **Telecommunications and technology.** Telecommunications and technology are essential to an effective I&R service. In addition, an organization needs experienced information & technology personnel to maintain and upgrade systems. United Way of Pierce County has always realized the importance of investing in our technical infrastructure to assure a secure and robust system. We have a full-time Director of Information Technology, who will oversee all required upgrades and installations, and who will be available to consult regarding operational technology issues. See *Telecommunications & Technology* section for more details.
- **Public Education.** A public awareness campaign is necessary to ensure effective use of 2-1-1. Dozens of 2-1-1 call centers across the nation have demonstrated that greater publicity and public education enhances the success of local 2-1-1 use. HelpLine/2-1-1 has focused on building awareness through partnerships with government, business, social services, and the media throughout the planning phase and will continue these partnerships into the operational phase. The rollout of 2-1-1 will be coordinated with WIN211 and other statewide network member call centers. See *Public Education* section for more details.
- **Evaluation and continuous quality improvement processes.** A comprehensive system-wide evaluation of 2-1-1 to demonstrate and improve effectiveness, compare and contrast with peers, and share best practices. HelpLine/2-1-1 uses outcome based evaluation measurement to

evaluate and improve performance. An important part of this process is the sharing of relevant information with governmental and other funding entities, with other 2-1-1 call centers, and with local providers. Outcomes include the ability to:

- Acquire measurable, relevant, comparable data;
 - Identify system strengths and limitations;
 - Identify training opportunities;
 - Assure quality of services, including the availability of accurate, up-to-date information;
 - Improve delivery and standardization of services; and,
 - Improve overall performance.
- **Resource development.** HelpLine/2-1-1 will work cooperatively with local and state governmental entities, human service providers, local businesses, and the philanthropic community to support the cost of 2-1-1 service provision in Pierce County.

Products

HelpLine/2-1-1 provides the following products to ensure that people have access to the right information at the right time and in the right way:

- **Print directories.** HelpLine publishes and sells a human services directory in both print and electronic formats. These directories contain more than 2200 listings of social service agencies and programs serving Pierce County.
- **Specialized resource lists.** Resource lists are provided to the community for issue-specific and general use. HelpLine's general use listing is the "Quicklist of Community Services," which lists the most referred to phone numbers. Examples of specialized lists include the Holiday Resource List, Affordable Housing List, Back-to-School Resource List, and Flu Shot/Immunization List.
- **Volunteer resources.** The Volunteer Center also publishes listings for people interested in volunteering, with specialized listings for youth and court-ordered volunteers.

TELECOMMUNICATIONS & TECHNOLOGY

Technology Overview HelpLine/2-1-1 has been successfully using the IRis (Information and Referral information system) software package to manage our local resources. As part of the WIN211 statewide system, we are in the process of moving from IRis to Resource House, the designated statewide platform. The move to Resource House will enable Pierce County to share data with the other designated call centers across the state. HelpLine/2-1-1 has upgraded its SQL server and computers to allow Information & Referral Specialists to access data quickly and easily.

Telecommunications Overview Pierce County residents seeking information and referral services dial 2-1-1. Calls are routed through the UCN call routing system based on area code and prefix. Calls originating in Pierce County are routed to HelpLine/2-1-1, Monday through Friday from 8:00 a.m. to 5:00 p.m. , with an after hours voice mail available. HelpLine/2-1-1 is connected with a T-1 line, allowing sufficient ports for the call center.

PUBLIC EDUCATION STRATEGY

Public Education Strategy

As a new social utility, 2-1-1 must be presented to the community in a clear and concise fashion. The first stage of the public education campaign will be to distinguish 2-1-1 from existing N-1-1 services (i.e. 4-1-1, 5-1-1 and 9-1-1), at the same time making clear the purpose of the 2-1-1 system. In order to educate the public on the appropriate use of 2-1-1, we will develop and disseminate a consistent message across all audiences, through all media.

Our public education strategy is being developed with the expertise of the United Way of Pierce County marketing department, in consultation with the WIN211 Communications Committee. The full marketing and outreach plan will not be implemented until Fall 2006 or at such time as adequate support exists to support the projected call volumes. Community outreach and development of materials will be coordinated to ensure outreach is targeted to appropriate agencies and consumers, for the purpose of:

- Building public awareness of 2-1-1
- Educating health and human service providers about 2-1-1 and how it can be of service to their clients and their staff
- Communicating a consistent message to the community regarding the appropriate use of 2-1-1

We will coordinate communication using the following matrix to ensure that all audiences receive a consistent message:

Faith-based organizations	<i>2-1-1 helps you serve your congregation/ members and those in need</i>
Public officials; policy makers; chambers of commerce	<i>2-1-1 improves access to help in this community</i>
Press and local media; libraries	<i>Help spread the word about 2-1-1 as a resource</i>
Hospitals, clinics, healthcare providers	<i>2-1-1 is a resource for your patients and your staff</i>
Major employers and small businesses	<i>2-1-1 is a resource for your employees; healthy employees make a stronger workforce</i>
Consumers, agencies, schools, community centers	<i>Help is available, regardless of where you live or work</i>

Community Outreach Strategy

In order to ensure the 2-1-1 message is appropriately delivered to a wide and diverse audience, we will implement the following community outreach strategies:

- **One-time.** TV/radio PSAs, newspaper advertisements, and other highly visible announcements

- **Short-term.** Public presentations, community events, public displays, and a targeted outreach campaign
- **Sustainable.** Nonprofit partnerships, community partnerships, and business sponsorships

In addition, we will:

- ***Encourage individuals to locate and access community resources.***
Effective outreach will serve to increase appropriate access of community resources. We will organize and implement outreach activities through neighborhood associations, schools, community fairs, flyers, public service announcements, and other community-based activities.
- ***Honor diversity.*** We will assess 2-1-1 messages and materials to make sure materials are developed with cultural sensitivity and are appropriate to diverse segments of our community.
- ***Develop materials to ensure appropriate messages are delivered to general audiences, the elderly, working poor families, etc.*** We will coordinate our outreach campaign to ensure accuracy of message, appropriateness of materials, and the development of culturally appropriate messaging. Potential outreach sites include schools, places of worship, food banks, neighborhood organizations, libraries, and child care centers.

STRATEGIC RELATIONSHIPS

Strategic Relationships Overview United Way of Pierce County was founded in 1921 and has an 85-year history of community support and development for the health and human service community in Pierce County. United Way of Pierce County is the operating agency for HelpLine, the Volunteer Center, Gifts-in-Kind, and Youth United. Since 1991, HelpLine has been providing comprehensive information and referral services in Pierce County.

Service Provider Strategic Relationships Because HelpLine has been operating as the comprehensive I&R service for Pierce County, many long-standing relationships have been formed with nonprofit and government agencies as well as specialized I&R providers, such as Child Care Resource & Referral, Senior Information & Assistance, and Sexual Assault Center. In addition, HelpLine is already well-positioned to provide both the “get help” and “give help” components of 2-1-1 because the Volunteer Center, Gifts-in-Kind, and Youth United programs are all operated within United Way.

Additional strategic partnerships will be crucial to the successful implementation of 2-1-1 in Pierce County. It is anticipated that primary local partnerships will grow over the next few years as we leverage 2-1-1 to expand services and develop new ways to work together throughout Pierce County.

Washington Information Network 211 (WIN211). WIN211 is the nonprofit organization responsible for planning and implementing the 2-1-1 system for Washington State. In 2003, the Washington State Legislature gave WIN211 oversight authority as well as authority to designate call centers to provide 2-1-1 services statewide. HelpLine is working collaboratively with WIN211 and the Washington State network of call centers to implement 2-1-1 statewide. HelpLine is in the process of transitioning to the statewide software platform, Resource House, and will become a part of the call routing system through UCN. HelpLine will continue providing the highest quality of service through use of the operating standards set forth by the Alliance of Information and Referral Systems (AIRS) and work towards becoming an accredited call center.

Specialized I&R Strategic Relationships HelpLine will develop Memoranda of Understanding (MOUs) between itself, as the local 2-1-1 call center, and other specialized information and referral programs serving the Pierce County area. A specialized I&R serves a specific population or provides information about a particular type of service in more depth such as intake, assessment activities and follow-up. These organizations frequently require information about resources beyond their own areas of focus, and they rely on data-sharing and partnership agreements with us to strengthen the quality of service they provide. Trained 2-1-1 specialists will refer to specialized providers when it is determined they would best be served by specific information and services. Each MOU will define the specific relationship, telephone procedures, data collection procedures, and the interagency referral process.

Public Sector Relationships We believe that building partnerships with the public sector, locally, statewide, and nationally, will be critical and essential to the sustainability of 2-1-1 and to the maintenance of ongoing, quality services for the communities we serve.

Some of the core public sector groups that we have partnerships with, or are targeting for potential partnerships, are: DSHS, Tacoma-Pierce County Health Department, county government, municipalities, Department of Emergency Management, 9-1-1 emergency response, library systems, police and fire departments, and local military and Tribal organizations.

2-1-1 ROLLOUT STRATEGY

2-1-1 Rollout Strategy Summary

To assure the Pierce County 2-1-1 system is able to meet local needs in a timely manner, as well as to ensure coordination with the statewide 2-1-1 system, HelpLine/2-1-1 has undertaken a systematic approach to implementing 2-1-1 in Pierce County. These phases include:

- **Building internal capacity and community partnerships;**
- **Building and implementing 2-1-1 call center structure; and**
- **Managing growth and development.**

Rollout Strategy Phases

HelpLine/2-1-1's strategy will be executed as follows::

- **Research, planning, and infrastructure.**
 - Building a solid foundation for the 2-1-1 system in Pierce County.
- **Building community partnerships.** Recognizing the need for community support to facilitate successful implementation of 2-1-1 locally, HelpLine/2-1-1 will:
 - Conduct meetings with county and city government, social service providers, and business leaders to introduce the concept of 2-1-1, to build support, and to encourage each organization to consider including 2-1-1 in its priorities for planning and funding;
 - Conduct meetings with public safety and emergency management agencies to discuss how 2-1-1 can support their operations, with particular emphasis on crisis management; and
 - Develop MOUs with specialized I&R providers, key human service providers, and other organizations.
- **Implementation.** Recognizing the need to enhance our internal systems in order to manage growth, HelpLine/2-1-1 has developed a plan which identifies key areas where upgrades to systems and staffing are required. It identifies the following enhancements:
 - Purchase and install SQL server
 - Install Resource House software and populate data from current data management system
 - Complete 2-1-1 business plan and fund development plan
 - Hire and train additional staff as funding allows
 - Adapt current policies and procedures to reflect AIRS accreditation standards
 - Develop and implement a public awareness campaign in cooperation with WIN211 and other call centers statewide
 - Conduct internal testing of 2-1-1 to determine system weaknesses
 - Work towards securing sustainable funding to enable HelpLine/2-1-1 to operate as per budget and business plan

- Determine performance feedback process to evaluate 2-1-1 effectiveness
- Establish “go live” date and publicity campaign
- Establish MOUs with other call centers for handling of after hours calls from Pierce County to enable 24/7/365 service provision
- Monitor call volume patterns against business plan projections.

KEY CHALLENGES

Key Challenges

HelpLine/2-1-1 has identified the following as potential challenges as the 2-1-1 system is implemented:

- ***Moving to full implementation in a time of financial uncertainty.***
HelpLine/2-1-1 is operating in an environment in which current funding is not certain, and prospective new funds from the efforts of WIN211 or from federal sources have not yet been confirmed. As such, we are acutely aware of the need to have an action plan that will allow us to scale our development to the appropriateness of funds available without compromising the quality of service delivery, the expectations of the public, or the ability to secure additional support.
- ***Overcoming the shrinking pool of social services.*** Less funding is being distributed to critical social service programs. Some of these programs are collapsing, while many others are forced to do more with less. This trend is especially problematic in rural areas of the county where resources are often less available and are located at a greater distance from the people who need them. Should this trend continue, directing callers to helpful resources will become more challenging.
- ***Educating the public about the appropriate use of 2-1-1.*** Since 2-1-1 is a new concept, it is anticipated that the public will need to be educated about 2-1-1 to distinguish it from 3-1-1, 4-1-1, 5-1-1, and 9-1-1. As a first step in addressing this challenge, we will establish protocols with 9-1-1 agencies to reroute inappropriate calls. Both the initial and ongoing public education efforts will be a challenge. HelpLine/2-1-1 will need to develop working arrangements with our key partners to elicit their support in publicizing the availability of 2-1-1.
- ***Ability to ensure accurate and timely data.*** There are more than 600 nonprofit and government agencies serving Pierce County. One of the challenges will be the ability to quickly gather changing information and update the centralized database accordingly. Further, HelpLine/2-1-1 recognizes the need to provide information that is geographically and culturally sensitive. To combat this issue, a Resource Management Coordinator has been hired to establish a database management system, including protocols to ensure up-to-date, quality information. Issues such as ensuring a comprehensive set of keywords and taxonomy are regularly updated will also fall with the scope of responsibility of the Resource Management Coordinator.
- ***Ability to keep up with changing telecommunications and technology.*** HelpLine/2-1-1 recognizes that its ability to provide extraordinary service depends on our ability to keep up with changing technology and deliver timely and accurate information. Toward this end, the Director of Information Technology will keep abreast of new technology trends and will work with IT staff from other call centers to ensure system continuity.

FINANCING 2-1-1 IN PIERCE COUNTY

Financing Need

In 2004, we received \$25,000 from WIN211 through the Board of Directors. These dollars were spent on needed office reconfiguration and staff time for the population of the new Resource House database. An additional \$19,000 from Employees' Community Fund of Boeing also helped to cover costs to increase existing HelpLine capacity in preparation for the addition of 2-1-1 service.

Ongoing, we anticipate a need of an additional \$130,000 to \$140,000 annually to sustain 2-1-1 services in Pierce County.

Financing Strategy

The development of a 2-1-1 system for Pierce County is dependent on the shared commitment of county and municipal government, United Way of Pierce County, and private funders to providing operating support for this service. Assumptions include:

- State and local government will contribute toward supporting 2-1-1. The ultimate goal is for 2-1-1 to be recognized and funded as part of the basic infrastructure of human services.
- Federal funding will have a significant role in matching local and state funds.
- Government will include 2-1-1 in its overall planning so that 2-1-1 can provide support as part of emergency/disaster response and public health, as well as human services.
- Government examines how full funding of 2-1-1, including the community resources database, can be integrated cost-effectively into programs targeting specialized populations (i.e., homeless, youth & family, juvenile justice, etc.), rather than duplicating these functions.
- Incorporating 2-1-1 in homeland security and bio-terrorism planning and funding to support the public communication aspect of this initiative.
- Working cooperatively with the statewide 2-1-1 effort to secure funding for the statewide network.

APPENDIX A: LEADERSHIP

Board of Directors

As of April 2006, the United Way of Pierce County Board of Directors is as follows:

<i>Name</i>	Doug Baker, Community Services Manager
<i>Position</i>	United Parcel Service
<i>Name</i>	Joanne Bamford, Community Volunteer
<i>Position</i>	
<i>Name</i>	Dennis Bloom, Vice President
<i>Position</i>	Merrill Lynch
<i>Name</i>	Maria Casella, Team Leader
<i>Position</i>	State Farm Insurance
<i>Name</i>	Jo Anne Coy, Vice President/Marketing Director
<i>Position</i>	Columbia Bank
<i>Name</i>	Ione Crandall, Director – Center for Public Service
<i>Position</i>	Pacific Lutheran University
<i>Name</i>	Mark Crisson, Director
<i>Position</i>	Tacoma Public Utilities
<i>Name</i>	Jim Dawson, Registered Principal
<i>Position</i>	LPL Financial Services
<i>Name</i>	Amy Goings, V.P. for College Relations
<i>Position</i>	Clover Park Technical College
<i>Name</i>	David Graybill, President & CEO
<i>Position</i>	Tacoma-Pierce County Chamber of Commerce
<i>Name</i>	Linda Gutmann, Director of Global Risk Management
<i>Position</i>	Russell Investment Group
<i>Name</i>	Marcia Harris, Deputy Superintendent
<i>Position</i>	Peninsula School District
<i>Name</i>	Donna Haynes
<i>Position</i>	Pilkey-Hopping & Ekberg, Inc.
<i>Name</i>	Don Johnson, V.P. and General Manager
<i>Position</i>	Simpson Tacoma Kraft
<i>Name</i>	Dianna Kielian, V.P. of Mission & Community Health
<i>Position</i>	Franciscan Health System
<i>Name</i>	Paul Knebel, Business Representative
<i>Position</i>	Machinist Union #751

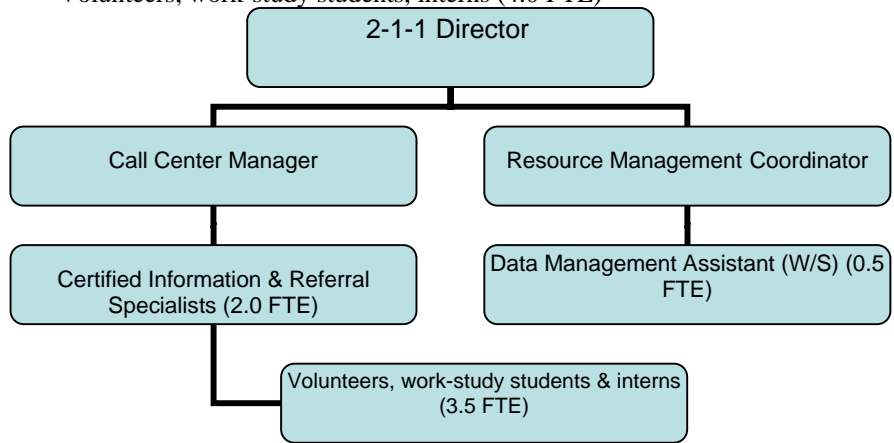
<i>Name</i>	Rod Koon, Director of Port Relations
<i>Position</i>	Port of Tacoma
<i>Name</i>	Jim Krueger, Attorney at Law
<i>Position</i>	Vandeberg, Johnson, Gandara
<i>Name</i>	Bob Magee, Chairman/President
<i>Position</i>	TOTEM Ocean Trailer Express
<i>Name</i>	Thaddeus Martin IV, Attorney at Law
<i>Position</i>	Law Offices of Thaddeus Martin IV
<i>Name</i>	Waylin McCurley, VP of Human Resources
<i>Position</i>	Rainier Pacific Bank
<i>Name</i>	Rick Meeder, Communications Manager
<i>Position</i>	Intel Corporation
<i>Name</i>	Madlyn Murray, RN, Administrator
<i>Position</i>	Mary Bridge Children's Hospital
<i>Name</i>	Sharon Ness, RN
<i>Position</i>	UFCW #141
<i>Name</i>	Tammy Phan, Youth Leadership Council
<i>Position</i>	Mt. Tahoma High School
<i>Name</i>	Ronald Robinson, Community Volunteer
<i>Position</i>	
<i>Name</i>	Patty Rose, Secretary-Treasurer
<i>Position</i>	Pierce County Central Labor Council
<i>Name</i>	MG Frank Scoggins, Commander
<i>Position</i>	WA Air National Guard
<i>Name</i>	Deborah Smith, Executive Director
<i>Position</i>	Exodus Housing
<i>Name</i>	Dale Sowell, V.P. Business Process & Systems
<i>Position</i>	Weyerhaeuser Company
<i>Name</i>	Vicki Thompson, Assistant Director, Russell 20-20
<i>Position</i>	Russell Investment Group
<i>Name</i>	Pamela Transue, President
<i>Position</i>	Tacoma Community College
<i>Name</i>	Michael Turek, Deputy Director
<i>Position</i>	Boeing Company
<i>Name</i>	Craig Ueland, CEO/President
<i>Position</i>	Russell Investment Group

<i>Name</i>	Cecilia Velazquez, Youth Leadership Council
<i>Position</i>	Stadium High School
<i>Name</i>	Jan West, Manager of Provider Relations
<i>Position</i>	Regence Blue Shield
<i>Name</i>	Scott Winship, Attorney at Law
<i>Position</i>	Vandeberg, Johnson & Gandara
<i>Name</i>	David Wrench, Sr. V.P. & District Commercial Leader
<i>Position</i>	Key Bank
<i>Name</i>	Debra Young, Director of Human Resources & Services
<i>Position</i>	City of Lakewood

**Management Overview
& Organizational
Chart**

It is anticipated that we will serve as many as 40,000 callers during our first full year of operations. This program development will significantly increase our staffing needs. The projected staff that will be needed are as follows:

- 2-1-1 Director (1.0 FTE)
- Call Center Manager (1.0 FTE)
- Certified Information and Referral Specialists (2.0 FTE)
- Resource Management Coordinator (1.0 FTE)
- Volunteers, work-study students, interns (4.0 FTE)



**Executive
Management**

We are managed by:

- Name* Shawn Parkhurst, HelpLine & Volunteer Center Manager
- Experience*
- Member WIN211 Network of Call Center Directors
 - Manager, HelpLine, United Way of Pierce County for four years
 - Creator and Manager, Volunteer Center, United Way of Pierce County for nine years
 - Program Coordinator, Healthy Families Program, Children's Home Society of WA for four years
 - Bachelor of Science in Business Management

- Name* Rick Falsetta, Sr. HelpLine Associate
- Experience*
- Supervisor, HelpLine, United Way of Pierce County for four years
 - Information & Referral Specialist, United Way of Pierce County HelpLine for two years
 - Bachelor of Arts in Business Administration
 - Certified Information and Referral Specialist, 2005

APPENDIX B: N-1-1 OVERVIEW

N-1-1 Overview

Among the FCC'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 used broadly by carriers for repair service.
7-1-1	Assigned nationwide for access to Telecommunications Relay Services (a service 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.