



**United Way of Lane County  
2010/2011 Strategic/Preventive Proposal**

- A.** Name of Organization: Community Sharing Program
1. Contact Person: Barbara Butzer
  2. Address: P.O. Box 351  
Cottage Grove, OR 97424
  3. Phone: 541-942-2176      Email: Barbara@communitysharing.org

**B.** Name of Proposed Services:  
Financial Stability Improvements & Partnerships in South Lane County

**C.** Amount of Funding Requested for a 12 month period:  
\$5,100

***The undersigned confirm that the information provided in this application is true and accurate and that the application has received / will receive Board approval.***

Barbara Butzer      2/25/10  
Signature: Agency Director      Date

[Signature]      3/1/10  
Signature: President, Board of Directors      Date

## SECTION I: Strategic/Preventive Action Area

Which Community Investment Strategic Action Area do the proposed services primarily address? (Please see **Appendix A UWLC 2010 Strategic/Preventive Goals and Funding Strategies for EDUCATION, INCOME and HEALTH.**)

1. **Action Area:** (select one)

**Education:** Preparing children to succeed in school and life.

**Income:** Moving families from poverty to financial stability.

**Health:** Ensuring people have basic access to healthcare.

2. **Strategies:** Based on your selection above, list the specific strategy or strategies the proposed services are designed to address. (*Note: Strategy or strategies listed must come from Appendix A referred to above.*)

a) Income Strategies: Improved Financial Literacy

b) Agency Capacity Building: Prosperity Planner Training; Poverty 101 Training; Community Engagement on Economic Development/Financial Stability Opportunities

3. Provide a **brief** (no more than one paragraph) executive summary of how you will address the strategies you listed in Question 2, above. Details will be expanded in Section II, questions 1-3.

**Financial Literacy funds** will be used for scholarships to enroll Community Sharing clients in local classes to improve their money management, budgeting, and tenant skills so they can move towards self-sufficiency. **Agency Capacity Building funds** will be used to educate the staff, Board and supportive community partners of our agency about the realities of poverty, best practices in eliminating it, and how our community's diverse partners can work together to accomplish this goal.

## SECTION II: SERVICE IMPACT

(Answers refer to Improved Financial Literacy portion of proposal)

### 1. Need, Target Population and Program Description

#### A. Need/Target Population

Identify the community problem/need the strategies described in Section I address, including the number of Lane County residents affected. Clearly link the need to the Community Investment Strategic Action Area goals and strategies selected in 1 and 2 above. *Also, include local trend information over the last five years as available/appropriate.* Describe how the proposed service(s) reach the intended target population for your Action Area (see Appendix A) and is appropriate to the need.

5,200 South Lane County households contacted Community Sharing Program for basic needs assistance in 2009 – one in eight. In addition, we turned away requests for housing assistance at a rate of 15-1. We provided nearly \$500,000 in assistance with housing, utilities, and other basic needs, which does not include the value of the food products we distribute in monthly emergency food boxes. 20% of our clients are households headed by single parents, usually women. 53% of our clients live in households with children. All of our clients live at less than 200% of the FPL.

**42% of our clients in 2009 had also received “emergency” services at Community Sharing in 2008.** While 33% of our clients describe themselves as without any income (an increase of 16% over 2008), the remaining 67% do have some income. This set of clients could potentially benefit from classes aimed at improving budget and financial management skills.

St. Vincent de Paul and OUR Credit Union began offering their financial literacy skills classes in Cottage Grove on a regular basis in fall, 2009. Community Sharing’s case managers promoted the classes among our clients; about 25 clients were referred to the classes and twelve attended. Most completed all class sessions. We are currently able to pay any enrollment fees with CSBG/ARRA (Federal stimulus program) funds. However, these funds will expire in June, 2010. We will not be able to help clients with scholarship money unless a new source of funding is obtained.

#### B. Service Description

Describe the proposed services for which you are requesting funds. Be very specific. The description should be a clear and logical response to needs outlined in Section 2, question 1A. Describe how your proposed services are designed to effectively meet the Community Investment Strategic Action Area goals and strategies selected in Section 1. Describe the research or evidence based methods which justify the proposed approach.

Community Sharing’s case managers will refer appropriate and interested non-financially self-sufficient people to classes that increase their understanding of basic budget and financial management, improve their ability to create and maintain a balanced household budget, and set goals and strategies for their financial future. When these clients are successful, they will not longer need to rely on emergency public assistance to keep themselves and their families housed and warm. St. Vincent de Paul Renter Rehab classes have a 94% success rate at getting people housed within six months.

We are requesting \$3,000 to use for scholarships to help low-income adults attend budget/ financial literacy and/or Renter Rehabilitation classes (including a financial literacy component) in Cottage Grove. Cost of attendance varies by class and, according to sources at the agencies presenting the classes, the costs may increase after July 2010. At \$200 per class, Community Sharing will provide 15 scholarships. Our partners in presenting these classes are St. Vincent de

Paul (the VIDA program and the Second Chance Renter Rehabilitation Program) and OUR Credit Union (the LifeLine program).

The classes take place in the Education Room at Community Sharing or in other locations within the community. For people with transportation limitations, it's important that these classes are offered in their own community. Community Sharing completed renovations to create a classroom at our campus, a familiar location to our clients, for just this reason.

**2. 2010/2011 Service Objectives and Outcomes**

**A. Service Objectives (# people to be served and/or services provided):**

*You may choose the 12-month reporting period that best matches your data collection system as long as the period begins in calendar year 2010.*

**12-Month Service Objectives:** 7/1/ 2010 through 6/30/2011  
 (Month/Day/Year) (Month/Day/Year)

**Proposed Service Objectives:**

15 low-income adult clients are able to balance their expenses with their incomes, and to make progress toward setting and achieving financial goals.

**B. Proposed Services Outcomes (measurable statement of intended effect on target population.)**

*Dates should match the service objective dates you specified in question 2 A.*

**12-Month Outcomes:** 7/1/ 2010 through 6/30/2011  
 (Month/Day/Year) (Month/Day/Year)

15 low-income adult clients who express interest & motivation receive scholarships in the amount of \$200 to attend classes in financial literacy offered by our community partners.

**Proposed Outcomes and Performance Measures for each proposed service (provide in table format, correlating measures to proposed outcomes):**

*Example: Note: Table can be expanded as needed to include all information.*

<i>Outcomes</i>	<i>Measures</i>
90% (14) of Community Sharing Program clients who voluntarily begin attending a financial literacy and/or renter success class will satisfactorily complete the course and any follow-up activities.	Class instructors provide attendance and graduation information to the referring case manager at Community Sharing.
Referred clients completing the course will provide feedback about their satisfaction with the course.	80% of clients, upon completion of the course, will complete a satisfaction tool administered by Community Sharing Program case managers.
90% of clients completing the course will make fewer requests for rent assistance.	Community Sharing staff create a spreadsheet of course attendees and

	compare it with client service file by end of grant period.
80% of clients completing the course will make fewer requests for non-LIEAP utility payment assistance.	Community Sharing staff create a spreadsheet of course attendees and compare it with client service file by end of grant period.

**Note:** Please include a copy of your Logic Model if one was developed. It is excluded from the 15 page limit.

### 3. Tracking Systems

What systems will be used to track the impacts and outcomes of the services provided and support continuous improvement? (e.g., telephone logs, client files, client satisfaction survey, pre-test/post-test, software systems, etc.) Please note if a tracking system is already in use, or if it will be developed to support the program.

Community Sharing Program uses the OPUS data management system required for contractors with the Lane County Human Services Commission. This is a powerful tool that tracks demographic, income, contact, and financial information for every client that comes to our agency (with the rare exception of a client who is *only* accessing emergency food).

Community Sharing's staff will create a client satisfaction survey and a spreadsheet for tracking client class attendance vis a vis requests for housing and energy assistance. With this information, we will be able to determine if clients who attend the financial education classes like them, find them useful and are able to successfully put their learning into practice.

## Community Sharing – Logic Model – Tuition Assistance – 10/11

### Impact

South Lane County residents are able to balance their expenses with their incomes, and to make progress toward setting and achieving financial goals.

### Outcome

90% of Community Sharing Program clients who voluntarily begin attending a financial literacy and/or renter success class will satisfactorily complete the course and any follow-up activities.

### Evaluation

The presenter will notify Community Sharing of which clients attended the classes and completed the coursework. (Payment is only made to the presenter after the client has completed at least ½ of the classes.) Clients will express satisfaction with the course using Community Sharing's written satisfaction survey tool.

The presenter agencies will evaluate the effectiveness of the course materials using their own tools. Community Sharing Program will track any increases/decreases in requests for basic needs financial assistance for each client completing a class for a period of two years.

### Metric

Percent of referred heads of households completing the class. (Target 90%)

Percent of referred clients completing the course satisfaction tool. (Target 80%)

Percent of households making fewer requests at CSP for rent assistance. (Target 90%)

Percent of households making fewer requests at CSP for non-LIEAP utility payment assistance (Target 80%)

### Output

11 heads of households currently (within the past 12 months) receiving rent or non-LIEAP utility assistance at Community Sharing Program successfully complete an approved financial literacy and/or renter success class within FY 2010/2011.

### Activity

Case managers refer interested clients to SVdP or OUR Credit Union classes as those agencies make them available in Cottage Grove (presently 4 times/year for financial management and 2 times/year for 2<sup>nd</sup> Chance Renter Rehab.

Class presenter and case manager communicate about which clients are attending class and which clients successfully complete the class.

Case managers ask clients who successfully finish the classes to complete a satisfaction survey for Community Sharing Program.

Community Sharing Program staff create and complete a spreadsheet that tracks class graduates' requests for rent and non-LIEAP utility assistance at our agency for two years. Staff will evaluate the data to look for changes in amount of assistance sought by these clients.

### Input

#### Existing:

.75 Housing Case Manager – supported through County HSC contract

.75 Energy Assistance Case Manager – supported through County HSC contract

.75 Hispanic Family Advocate – supported through United Way of Lane County

Recently completed classroom space on site at Community Sharing Program

#### Needed

\$3,000 in class tuition funds for clients

.05 Administrative Assistant/Volunteer Coordinator – requested in United Way Basic Needs application submitted separately by Community Sharing Program

Strategy

Refer appropriate and interested non-financially self-sufficient people to classes that increase their understanding of basic budget and financial management, improve their ability to create and maintain a balanced household budget, and set goals and strategies for their financial future. When these clients are successful, they will not longer need to rely on emergency public assistance to keep themselves and their families housed and warm.

Indicator

Community Sharing Program served more than 5,000 households (one in eight) in South Lane County in 2009 with basic needs assistance. Our case managers meet regularly with clients and hear their stories and struggles to match expenses to household income. Many clients return to us annually with "emergency" needs, indicating that financial forecasting and planning is not taking place in a successful manner. When clients are notified that financial management and successful tenant classes are available to help build their skills, a high percentage express sincere interest in attending.

Condition

Economic conditions in South Lane County have been depressed since mill closures began in the 1980's. The current recession has resulted in a 15% increase in requests for emergency basic needs assistance at Community Sharing Program. We recognize that simply making a utility payment or giving a food box does little to change the conditions that result in poverty. Community Sharing staff and Board members view financial education for clients as one step toward long-lasting, effective change in poverty conditions.

\$3,000 = 12 heads of households will receive tuition assistance to attend either the SVdP 2nd Chance Renter Rehab course (10 weeks) or the OUR Credit Union LifeLine (4 weeks). These households will be in addition to any that might be referred to the SVdP VIDA program, which is currently offered only twice annually in South Lane County.

## SECTION II: SERVICE IMPACT

(Answers refer to Agency Capacity Building portion of proposal)

### 1. Need, Target Population and Program Description

#### B. Need/Target Population

Identify the community problem/need the strategies described in Section I address, including the number of Lane County residents affected. Clearly link the need to the Community Investment Strategic Action Area goals and strategies selected in 1 and 2 above. *Also, include local trend information over the last five years as available/appropriate.* Describe how the proposed service(s) reach the intended target population for your Action Area (see Appendix A) and is appropriate to the need.

Community Sharing Program was founded in 1984 as a basic needs response agency for workers who lost work during the closure of the Bohemia Lumber Mill. Since that time Community Sharing has delivered food, housing, utility and supplemental emergency services in basically the same model. The continuing economic slump and high unemployment in the area produced a 15% increase in requests for our services over the past two years. It is clear that simply continuing to do "business as usual" is not the same as "doing our best." Community Sharing's Board of Directors and staff members recognize that we must be part of the solution to poverty in South Lane County by offering innovative, sound programs that are coordinated with our partners in and beyond this region.

Community Sharing staff members work almost exclusively in specific programs funded by contracts that strictly control how their time can be spent. There is little opportunity to spend time learning about new ideas or best practices, or to train as a team to realign our service models. Therefore, we are asking United Way of Lane County to provide a small amount of funding to allow our staff to obtain training and to network with regional partners in promoting prosperity (including United Way).

#### B. Service Description

Describe the proposed services for which you are requesting funds. Be very specific. The description should be a clear and logical response to needs outlined in Section 2, question 1A. Describe how your proposed services are designed to effectively meet the Community Investment Strategic Action Area goals and strategies selected in Section 1. Describe the research or evidence based methods which justify the proposed approach.

Community Sharing Program's staff are trained in Poverty 101 and use of the Prosperity Planner. They are able to articulate new learning and are able to actively participate in a team decision about the value of incorporating the Prosperity Planner into the agency's daily business.

The Executive Director, in addition to participating in the above activities, also participates in economic development activities within Cottage Grove/Creswell (Economic Development Committee) and represents rural needs/strengths at regional economic improvement/financial stability meetings. Examples of the latter could include: continuing development/implementation of the Opportunity Conference model; Circles Campaign; micro-enterprise research for rural small towns, or other emerging trends that we can incorporate to improve financial stability for our client population (people living at 200% of FPL or less).

**3. 2010/2011 Service Objectives and Outcomes**

**A. Service Objectives** (# people to be served and/or services provided):

*You may choose the 12-month reporting period that best matches your data collection system as long as the period begins in calendar year 2010.*

**12-Month Service Objectives:** 7/1/ 2010 through 6/30/2011  
 (Month/Day/Year) (Month/Day/Year)

**Proposed Service Objectives:**

- 100% of agency staff receives training in the Prosperity Planner model.
- 100% of agency staff receives training based on the Poverty 101 model.
- 3 poverty awareness trainings take place in diverse settings in South Lane County.
- The Executive Director attends 3 Cottage Grove Economic Development committee meetings and at least 4 regional financial stability events/meetings as a representative of rural South Lane County.

**B. Proposed Services Outcomes** (measurable statement of intended effect on target population.)

*Dates should match the service objective dates you specified in question 2 A.*

**12-Month Outcomes:** 7/1/ 2010 through 6/30/2011  
 (Month/Day/Year) (Month/Day/Year)

- 100% of agency staff is familiar with the Prosperity Planner model and participates in a group decision about whether to incorporate this model into the daily operations at Community Sharing Program. (Note: the timeline for training in use of the Prosperity Planner is contingent on it becoming available through Lane Workforce Partnership).
- 100% of agency staff expresses understanding of the Poverty 101 model and demonstrates learning through a pre/post training test.
- 3 community groups (to be determined) demonstrate understanding of the Poverty 101 model through a pre/post training test.
- The Executive Director tracks attendance at Cottage Grove Economic Development Committee meetings and notes how attendance influences decision making by the committee and at Community Sharing Program.
- The Executive Director tracks attendance at regional financial stability events/meetings and notes how attendance influences decision making, networking, collaboration building, and program/policy changes at Community Sharing Program.

**Proposed Outcomes and Performance Measures for each proposed service** (provide in table format, correlating measures to proposed outcomes):

*Example: Note: Table can be expanded as needed to include all information.*

Outcomes	Measures
100% of agency staff trained in Prosperity Planner	Sign in sheet at training
100% of agency staff participate in decision regarding incorporating Prosperity Planner model	Sign in at staff meeting; minutes reflect participation, discussion, decision

<i>into daily operations of agency.</i>	
<i>100% of agency staff attend Poverty 101 training and demonstrate learning</i>	<i>Sign in sheet at training; pre/post tests indicate learning</i>
<i>3 community groups receive Poverty 101 training and attendees demonstrate learning</i>	<i>Sign in sheet at training; pre/post tests indicate learning</i>
<i>Ex. Dir. attends Cottage .Grove. Econ. Dev. Comm. meetings and actively participates</i>	<i>Ex. Dir. takes notes at meetings; meeting coordinator takes notes at meetings</i>
<i>Ex. Dir. attends regional financial stability events and actively participates</i>	<i>Ex. Dir. keeps a log of meetings attended, new contacts made, potential/actual collaborations built; program/policy changes at Community Sharing Program</i>

**Note:** Please include a copy of your Logic Model if one was developed. It is excluded from the 15 page limit.

**3. Tracking Systems**

What systems will be used to track the impacts and outcomes of the services provided and support continuous improvement? (e.g., telephone logs, client files, client satisfaction survey, pre-test/post-test, software systems, etc.) Please note if a tracking system is already in use, or if it will be developed to support the program.

All Community Sharing Program employees maintain monthly time allocation spreadsheets. Employees will note their attendance at United Way-funded trainings and meetings on these spreadsheets. (The spreadsheets are vetted and approved via the County's Human Services Commission finance department.)

The Prosperity Planner and Poverty 101 trainers will develop a pre/post training test to assess learning.

## Community Sharing Program – Logic Model – Agency Capacity Building – 10/11

### Impact

South Lane County residents benefit by the alleviation of poverty as Community Sharing Program makes highly effective use of scarce human services funds.

### Outcome

Community Sharing Program staff are knowledgeable of best practices and emerging ideas related to low-income household financial stability and apply this knowledge to improved delivery of services.

### Milestone

Within FY 10/11:

- 2 staff members complete the Prosperity Planner training offered by Lane Workforce Partnership, then train the remaining 5 staff members at a special staff meeting
- 1 staff member, who has already completed the Poverty 101 training, will use “trainer” skills to present 3 poverty awareness trainings within the South Lane Community. One training will be for CSP staff members at a special staff meeting.
- The Executive Director will attend 3 hours of economic opportunity meetings per month, in Eugene or in Cottage Grove/Creswell, to connect South Lane County with regional efforts, building partnerships with Lane Workforce Partnership, United Way’s Financial Stability team (including continuing work that will emerge from the Opportunity Conference) and the Cottage Grove Economic Development committee, sponsored by the local Chamber of Commerce, where she could provide a pragmatic perspective on efforts to create local jobs through small business development and worker training.

### Evaluation

Staff members track hours spent in selected trainings, respond to Executive Director’s request for comments on how the trainings impact their daily work, track new/improved partnerships with financial stability/economic development leaders. People attending the Poverty 101 training will complete pre/post-training self-evaluation of changes in knowledge, attitudes, and skills. The Executive Director will track activities and changes in knowledge/skills in her monthly report to the Board of Directors, who in turn will compare these changes to the overall goals of the agency as set forth in the 3-year strategic plan.

### Metric

100% of agency staff receives training in the Prosperity Planner model.  
100% of agency staff receives training based on the Poverty 101 model.  
3 poverty awareness trainings take place in diverse settings in South Lane County.  
The Executive Director attends 3 Cottage Grove Economic Development committee meetings and at least 4 regional financial stability events/meetings as a representative of rural South Lane County.

## Output

Community Sharing's staff, executive director and Board of Directors understand the role that they and the agency can take, based on researched best practices, in creating economic opportunity for low-income South Lane County residents. Decisions and actions take place in a thoughtful, knowledge-filled environment.

## Activity

2 staff members attend the "Train the Trainer" Prosperity Planner training (8 total hours of staff time)

7 staff members attend the in-house Prosperity Planner training (21 total hours of staff time)

6 staff members attend the Poverty 101 in-house training (18 total hours of staff time)

1 staff member plans the Poverty 101 community training sessions and delivers them in 3 separate locations (20 total hours of staff time)

1 staff member (Executive Director) attends 18 hours of community-based financial stability meetings, plus 4 hours travel time

## Input

Experienced case workers are in place on staff, but with limited time (by contracts) to devote to this type of activity. Financial support is needed to allow for extra training hours and diverse activities outside regular scope of work. Staff hours anticipated to total at least 90 to complete the activities, with a financial need of \$2,100 to pay for this time.

## **SECTION III: SERVICE MANAGEMENT**

### **1. Client Involvement**

Describe your client involvement systems and how they lead to more efficient and effective services. For example: How are clients involved in service planning, offering feedback or making suggestions about your services? How do you measure client satisfaction? How do your feedback systems lead to more effective services? Please provide examples.

Clients are involved in Community Sharing Program's emergency food and clothing pantry on a daily basis. They repack food, sort clothes, and assist clients while they are shopping. Clients as volunteers accept donations from the general public. They constitute a significant amount of the volunteers hours at our agency (over 10,000 hours annually), and they are often the public face of the agency to community members.

Client involvement is also achieved through face to face interactions between well-trained staff and clients. Clients are able to speak about their needs and their strengths, and this information is relayed to staff meetings where decisions for changes or improvements in our service system take place. Examples include creation of a short-term "Breathing Room" shelter program utilizing a local motel (suggested by clients who recently lost housing), offering more ethnically diverse foods in our emergency pantry (suggested by Latinas meeting with our Hispanic Family Advocate), and growing preferred foods in our pantry educational garden (a survey is completed by food recipients annually).

A client feedback form is available in our reception area; we receive several completed forms monthly. The Executive Director offers an open-door policy for clients to deliver kudos, complaints or suggestions about services. Because we are a small office, the Executive Director can hear the interchange at the reception desk and know first-hand if a client expresses satisfaction or discontent. She can and does invite clients into her office for conversation.

Our Board of Directors offers an annual opportunity for clients to meet with them over a light lunch to give direct feedback. Last year we learned about campsite locations and the need for increased temporary housing in South Lane.

We actively recruit clients to sit on our Board of Directors; however, this strategy has met with limited success. The Board's annual focus group was implemented as an alternative, although we continue to invite and encourage client involvement on the Board or its committees.

### **2. Coordination/Collaboration**

Describe specifically how you work with others in the community to maximize service to the people you serve. List any formal relationships, the nature of the partnership and the type of agreement (i.e. Memorandum of Understanding, Service Agreement, Contract or other documentation.)

- Community Sharing Program is one of 200+ emergency food pantries in Oregon. We contract and partner with the Oregon Food Bank and FOOD for Lane County to distribute emergency food boxes to low-income households in our geographic area.
- Community Sharing Program contracts with Lane County Human Services Commission to distribute public funds through a Community Service Center, a Housing Program, and an Energy Assistance Program. Our annual contracts require extensive reporting for each fund and the use of the OPUS client database.
- Community Sharing Program continues to partner with United Way of Lane County (since 1990). Our grants (in 2009) include support for pantry operations and for the South Lane Hispanic Family Advocate

position.

Our agreement with United Way includes not only funding and work output, but also participation in the United Way campaigns and identifying United Way as a funder on our literature.

- We partner regularly with funding foundations who support our work. Examples include the Cottage Grove Community Foundation, the Woodard Family Foundation, and several regional tribal community funds. We sign a contract or agreement with each funding foundation to use the funds as outlined in the proposal, and we provide narrative and financial reporting.

- We collaborate on service coordination and provision with dozens of local providers, including:

- Cottage Grove Hospital and Clinics (especially the medical social workers)
- South Lane and Creswell School Districts (especially the homeless school liaisons)
- St. Vincent de Paul Society, located at Our Lady of Perpetual Help church in Cottage Grove
- Family Relief Nursery, LookingGlass rural program, Bohemia Elementary Family Resource Center, Kennedy Alternative High School, and other youth-oriented programs. We attend the monthly social service networking meetings coordinated by Parent Partnership.
- Department of Human Services
- South Lane Mental Health (our next-door neighbors)
- South Lane Wheels (our other next-door neighbors)

- We rely on the financial and volunteer support of many South Lane individuals, businesses, and civic organizations.

### **3. Diversity / Accessibility**

*"United Way of Lane County believes that respect for and understanding of all cultures, peoples, and lifestyles are central to our mission of helping people care for one another. To that end, United Way will demonstrate that it values diversity in its funding of programs in Lane County. We will attempt to promote and recognize programs and organizations which provide culturally appropriate services, ensure access for people needing those services, and show a valuing of diversity in volunteer, staff, and service systems." --United Way of Lane County's Diversity Statement*

Describe how diverse segments of the community have access to the proposed services. Describe your efforts to continuously improve services to underserved populations. Diversity can include but is not limited to: race, gender, ethnicity, physical ability, sexual orientation, age, familial status, economic status, rural/urban location.

Community Sharing Program provides services to all income-qualifying residents of South Lane County, regardless of their personal status. (The only exception would be administration of public funds for programs that specifically exclude undocumented workers.) Our agency's facility is fully accessible according to a voluntary inspection we received in 2009. Three staff members are bilingual Spanish/English (two are bicultural also). On a daily basis our reception area is host to people of great diversity, including physically disabled, mentally challenged, young families, homeless veterans, single parents, Spanish speakers, trans-gendered, or Native American. Our clients all live at or below the 200% FPL.

Recruitment of staff, volunteers and Board members occurs broadly across the community. Effort is focused on recruiting diverse membership, especially from the Latino community. This effort has met with greater success for staff than for volunteers; however, a few pantry volunteers are of Latino heritage. The Executive Director, with a Master's Degree in Cultural Anthropology, appreciates the benefit of maintaining a diverse work environment to appropriately serve and partner with all segments of our community.

#### 4. Use of Volunteer and Partnership Resources

Describe how you use volunteers. Include type of positions they hold, number of volunteers, and total volunteer hours per year. Describe your capacity to mobilize additional community partners and/or in-kind resources in conjunction with the proposed services.

As described above, many of our volunteers are also clients. They work primarily in the emergency food pantry and clothes closet. Our policy does not allow clients to work in the office area with confidential files. We recruit office volunteers from the community. They are retired individuals, students and citizens with extra time and a desire to help. They greet clients, maintain files, answer and direct phone inquiries, write vouchers for basic client services, and assist with clerical and fund-raising activities. Volunteer gardeners work in our community education garden by teaching skills to clients and other community members, planting and weeding, and harvesting the crop for our pantry. Volunteers bring in firewood for distribution to clients; sell tickets to fundraising events, cook soup for our annual "Souper" Fundraiser, and distribute holiday food boxes in December. We are also a site for minor offenders to work out community service hours, an activity that frequently results in the person remaining as a regular volunteer because they enjoy the environment and want to help others.

Our Board of Directors consists of 10 volunteers who donate hundreds of hours of time to oversee policies, procedures and financial operations of our non-profit agency. They are actively involved in fundraising and public outreach activities.

In FY 08/09, Community Sharing Program had more than 70 people volunteering on site (does not include those who raised food or funds at community-based events on our behalf), and those volunteers donated nearly 12,000 hours of time. This exceeds the number of paid hours worked by our staff during the same period. We are truly a place of sharing goods, services and time. Those in our community who have something they can share do so, and those people in need know they can receive assistance from their neighbors.

#### 5. Budget

- A. Complete the budget form (Appendix B) included separately. (attached)  
Note that the budget includes all funds requested from United Way for FY10/11; however, this budget document does include the Strategic Investment request (hence it shows \$5,100 more income and expenses than the Basic Needs budget document).
- B. Describe the return on the UWLC investment. Include such factors as demonstrated cost effectiveness and efficiency of service delivery, how you will leverage other financial investments to support the work and the sources of other financial investment for this work. Describe how the work improves the effectiveness of the human services network in Lane County.

Community Sharing Program, as a small rural non-profit agency, is at times excluded from learning opportunities that are available to agencies in the Eugene/Springfield area. Because of our small size and limited staff, there is little overlap or backup for staff absence, which makes it difficult to send any staff member to training out of the office. Additionally, we must add one hour of travel time and \$20 in mileage costs to any trip to Eugene/Springfield for training. All of these factors combine to create an internal climate of "making due with what we have" and "don't ask for training or opportunities, because there's no budget for it."

When Community Sharing Program's staff increases understanding of the issues facing their clients and the strengths those people bring to their life situations, there is an opportunity to remodel our program delivery to build on those strengths. We can become partners with our clients in creating a plan for their financial recovery and stability. We can help them realize their potential and gain self-confidence.

As a member of the Human Services Network of Lane County, Community Sharing Program will continue to influence policy decisions that impact on distribution of government and local funding throughout Lane County, but particularly to rural areas.

C. If you are requesting funding for Capital investment, including funding for physical space or renovation, you must include the full cost of the capital project and how you will fund the balance outside the UWLC amount. Not applicable.

6. **Follow-Up**

If you received a United Way Allocation in 2009, the United Way volunteer-led review panel will receive copies of your most recent panel summary report. Were there any concerns or conditions for continued funding identified by the United Way review panel during the last review?

Yes  No

If yes, how have these been addressed by your agency?

7. **Governance, Management & Organizational Capacity**

Briefly describe how this program fits into your organizational structure, how it will be managed, and how oversight will be provided.

Community Sharing Program's mission is to provide basic needs assistance to low-income residents of South Lane County. The activities contained in this proposal will help both clients and staff/management to make excellent use of limited resources as we strive to meet our mission. Clients will become more knowledgeable of good financial/budget practices, hence needing our assistance less frequently. Staff/management will understand the strengths and needs of our clients more fully and will be knowledgeable of emerging best practices for developing financial stability among our client population. Both clients and staff show marked interest in pursuing these learning opportunities.

The proposed grant-funded activities do not create a new program. They supplement the work our staff is already doing. Our organizational structure will not change, but our staff will have a few flexible hours outside of their contract-funded work to pursue education and systems-based thinking, then share what they learn with each other as we consider making policy or procedural changes at the agency.

The project will be overseen on a daily basis by the Executive Director, with recordkeeping assistance from the Finance Manager. The Board of Directors will ultimately oversee any proposed policy changes at the agency. They have approved this proposal and they support the agency's shift in direction to offering more "up stream" interventions that can lead to client financial stability. Their approval will be reflected in the updated agency strategic plan, scheduled for completion in summer, 2010. The planning work is supported by financial assistance from the Ford Family Foundation in Roseburg and facilitated by Steve Swafford of Leadership Outfitters, Inc.

***Complete Appendix C, Required Compliance Documentation, Exhibit A – Best Organizational Practices and Management.***

Describe the ability of the organization to carry out the proposed services successfully and efficiently based on current resources, i.e. expertise of staff, diversity of funding sources, board composition and involvement, fiscal and governance systems and facilities.

8. **Policy Adherence**

UWLC requires all service partner organizations to follow and adhere to the following UWLC Policies and Certification Documents:

- **Non-Discrimination Certification**
- **USA Patriot Act Anti-Terrorism Compliance Measures**
- **Agency Direct Fundraising Policy**
- **Donor Designation Policy**

**Strategic/Preventive Investment Application**



**Proposed Services BUDGET**

(fill in the yellow cells)

Agency Name:

**Community Sharing Program**

Proposed Services:

**Financial Stability Improvements & Partnerships in South Lane County**

	Prior 12 Months	Future 12 Months
<b>REVENUE/SUPPORT</b>		
United Way Funding/Request (do NOT include Donor Designations)	\$39,047.00	\$55,900.00
Public Support: Contributions/Fundraising Events (include Donor Designations)	\$66,410.00	\$46,500.00
Government Funding	\$140,535.00	\$289,690.00
Foundation/Corporation/Other Grants or Major Gifts	\$22,867.00	\$22,000.00
Program Service Fees or Membership Dues	\$423.00	\$150.00
Other Revenue	\$6,290.00	\$5,500.00
<b>Total Revenue</b>	<b>\$275,572.00</b>	<b>\$419,740.00</b>
	<b>Actual</b>	<b>Estimated</b>
<b>EXPENSES</b>		
Personnel Related	\$151,962.00	\$203,100.00
Client Assistance	\$63,982.00	\$128,275.00
Other Direct Program Expenses	\$43,828.00	\$58,365.00
Administrative Overhead	\$15,800.00	\$30,000.00
<b>Total Expenses</b>	<b>\$275,572.00</b>	<b>\$419,740.00</b>
<b>NET</b> (should be zero)	<b>\$0.00</b>	<b>\$0.00</b>

What percent of your <b>agency</b> budget do these proposed services represent?	100%	100%
What percent of your <b>agency</b> revenue is the United Way request?	7%	8%
Number of employee FTE's (full-time equivalents) in proposed services?	0.75	1.13
Percentage United Way request to overall proposed services revenue	14%	13%
Administrative overhead percentage applied to proposed services	6%	8%

Completed by:

**Barbara Butzer, Executive Director**

# Attachment A

## United Way of Lane County Best Organizational Practices and Management

Agency Name: Community Sharing Program

The following questions represent generally accepted best practices for the management and governance of non-profit organizations. Please respond with **Yes** or **No**. If **No**, provide a brief explanation. (Note: These are not required and some policies and activities may not be appropriate for your agency.)

ORGANIZATIONAL MISSION AND DIVERSITY	Yes	No	Other/Explain
<b>A. Mission</b>			
1. Our agency has a written mission statement that reflects our purposes and values.	x		
2. The board regularly reviews our agency's mission statement.	x		
3. Our agency engages in annual planning that helps define organizational and divisional goals.	x		
<b>B. Diversity</b>			
1. Our agency's governance and operations strive to be inclusive of all parts of our community.	x		On-going work, not always easily met
2. Our agency strives to reflect the diversity of the community we serve.	x		
3. Our agency has a written policy and practice of non-discrimination in the following areas:			
a. Employment (recruitment, hiring, assignment, promotion, discipline, termination)	x		
b. Board and committee participation		x	
c. Volunteer selection		x	
d. Service delivery	x		

FINANCIAL MANAGEMENT	Yes	No	Other/Explain
<b>A. Audit</b>			
1. Our agency has an annual audit or review done by an independent certified public accounting firm.	x		
2. If yes, the reports and management letter (if provided) are reviewed by a finance committee or the board.	x		
<b>B. Financial Transactions and Controls</b>			
1. Our board has approved a policy specifying that dual signatures are required on checks over a certain amount.	x		
2. Our board has approved a delegation of authority to specified levels of management that shows types and limits of spending or approval authority.	x		

<b>C. Money &amp; Investments</b>	<b>Yes</b>	<b>No</b>	<b>Other/Explain</b>
1. Bank deposits are FDIC insured and account balances are at or below the \$250K limit.	<b>x</b>		
2. The board has adopted an investment policy that is regularly reviewed.		<b>x</b>	Reviewed at meetings, but not a formal policy
3. Securities, mortgages, insurance policies and similar instruments are under the control of the executive director, chief financial officer, or board member.	<b>x</b>		
<b>D. Capital Equipment</b>	<b>Yes</b>	<b>No</b>	<b>Other/Explain</b>
1. The board approves all equipment purchases, leases, and related renewals over a certain dollar amount.	<b>x</b>		
2. Periodic physical inventories are taken and compared with the capital equipment ledgers.	<b>x</b>		
<b>E. Accounts Payable</b>	<b>Yes</b>	<b>No</b>	<b>Other/Explain</b>
1. The board has approved a written purchasing policy.		<b>x</b>	
2. All deposits for payroll taxes, employee retirement contributions, etc. are made in a timely manner.	<b>x</b>		
3. Purchases for or on behalf of employees are made pursuant to a board-established policy.	<b>x</b>		
4. Credit cards are issued in the agency's name but assigned to specific employees and in line with board policy.	<b>x</b>		
5. Credit card usage by employees is limited to use specified by board policy and is periodically reviewed by supervisors or, in the case of the executive director, the budget or finance committee.	<b>x</b>		
<b>F. Employees Expense/Reimbursement</b>	<b>Yes</b>	<b>No</b>	<b>Other/Explain</b>
1. We have a board-approved policy governing if and when salary advances (draw), travel advances, and per diems are provided to staff.		<b>x</b>	Executive Director approves these expenses
2. There is a travel and employee expense reimbursement policy approved by our board.	<b>x</b>		
3. Employees are required to submit expense reports for all reimbursements within 60 days of expenditures.	<b>x</b>		
4. The board assures that the executive director's travel and expense reimbursement are reviewed and approved.	<b>x</b>		
<b>G. Budgeting and periodic financial reports</b>	<b>Yes</b>	<b>No</b>	<b>Other/Explain</b>
1. Our agency forecasts financial requirements for proposed program activity and optimum use of funds.	<b>x</b>		
2. The executive director prepares an annual comprehensive operating budget and capital budget, presents the budget to the board for approval, and establishes controls to assure that budgetary objectives are achieved.	<b>x</b>		
3. Substantial changes in the budget are presented to the board for approval.	<b>x</b>		
4. Our board, or the financial committee:			
a. Reviews the financial statements (statement of	<b>x</b>		Monthly

activities, statement of position) on a quarterly basis	<b>x</b>		
b. Receives explanations of major variances.	<b>x</b>		
c. Receives a comparison of actual to budgeted expenditures for the reporting period and year-to-date by program.			
d. Reviews source and amounts of funding by function.	<b>x</b>		
<b>GOVERNANCE</b>	<b>Yes</b>	<b>No</b>	<b>Other/Explain</b>
<b>A. Board of Directors</b>			
1. Our agency has a governing board of citizen leaders.	<b>x</b>		
2. Our board is a volunteer group serving without compensation.	<b>x</b>		
3. Each board member has received training, as well as guidance materials on board governance and our agency operation.	<b>x</b>		
4. Our board ensures the creation of and approves agency policies and procedures.	<b>x</b>		
5. Our board hires, terminates, evaluates, and sets compensation for the executive director.	<b>x</b>		
6. Our board delegates responsibility for day-to-day agency operations to the executive director.	<b>x</b>		
7. Our board meets at least quarterly. Indicate how often: <u>9 times per year</u>	<b>x</b>		
8. Our agency creates and maintains permanent board minutes.	<b>x</b>		
9. Our agency ensures continuity by having overlapping board member terms.	<b>x</b>		
10. Our board's nominating process ensures that the board remains appropriately diverse with respect to gender, ethnicity, culture, economic status, disabilities, and skills and/or expertise.		<b>x</b>	We are working to improve Board diversity
11. Our board has a process for handling urgent matters between meetings.	<b>x</b>		
12. Each board member has contact information for the entire board.	<b>x</b>		
13. Our board evaluates the executive director on an annual basis.	<b>x</b>		
14. Over the last year, at what percent of your board meetings did you have a quorum in attendance? Indicate percentage <u>100%</u>	<b>x</b>		
<b>B. Bylaws and Policies</b>	<b>Yes</b>	<b>No</b>	<b>Other/Explain</b>
1. Our agency has written bylaws.	<b>x</b>		
2. Our agency provides each board member a copy of the bylaws.	<b>x</b>		
3. Our bylaws state the requirements for a board quorum.	<b>x</b>		

4. Our board regularly reviews the bylaws.	<b>x</b>		
5. Our agency has written operational policies and procedures.	<b>x</b>		
6. Our board has approved a code of ethics for both staff and volunteers, which includes provisions for ethical management, client confidentiality, publicity and fundraising practices.	<b>x</b>		
7. Our agency has a written conflict of interest policy and a mechanism for resolving conflicts should they occur.	<b>x</b>		Implemented 2009
8. Our board ensures that the agency has personnel policies and written job descriptions.	<b>x</b>		
<b>C. Board Committees</b>	<b>Yes</b>	<b>No</b>	<b>Other/Explain</b>
1. Our agency has standing and special committees that have been established to achieve efficiency of operations and share responsibility for decision-making.	<b>x</b>		
2. Our agency's board members serve on at least one board committee.	<b>x</b>		
3. Our agency committees meet on a regular basis (monthly or quarterly).	<b>x</b>		mostly true
4. Our agency committees' activities and recommendations are reported to the board (verbally or in writing) for approval/action.	<b>x</b>		
<b>D. Compliance with legal requirements</b>	<b>Yes</b>	<b>No</b>	<b>Other/Explain</b>
1. Our agency complies with all applicable legal, local, state, and federal operating and reporting requirements, including non-discrimination and non-profit requirements.	<b>x</b>		
2. We have been the subject of a governmental investigation in the last 24 months.		<b>x</b>	
<b>E. Insurance</b>	<b>Yes</b>	<b>No</b>	<b>Other/Explain</b>
1. We have liability insurance covering volunteers, staff and board of directors.	<b>x</b>		
2. We have general liability coverage.	<b>x</b>		

Agency Name: Community Sharing Program

Prepared By (Name): Barbara Butzer

Title: Executive Director

Date: 12/16/09

**Attachment B**

**United Way of Lane County  
UWLC Policies and Certification Documents**

**"I hereby certify that**

**Community Sharing Program**

(print agency name)

**agrees to follow and adhere to the following UWLC Policies and Certification Documents:"**

- **Non-Discrimination Certification**
- **USA Patriot Act Anti-Terrorism Compliance Measures**
- **Agency Direct Fundraising Policy**
- **Donor Designation Policy**

**Signature, Agency Director:** Barbara Butzer

**Print name:** Barbara Butzer

**Date:** 12/16/09

## United Way of Lane County

### NON-DISCRIMINATION CERTIFICATION OF COMPLIANCE

**“I hereby certify that our agency/organization is in compliance with all applicable Federal, State, and local laws that may apply to our agency regarding discrimination on the basis of: race, religion, color, sex, national origin, marital status, familial status, age, source of income, disability, sexual orientation, and any other category protected by such laws.”**

### ANTI-TERRORISM COMPLIANCE MEASURES

**“I hereby certify that our agency/organization is in compliance with the USA Patriot Act and other counterterrorism laws, United Way of Lane County requires that each agency certify that all United Way funds and donations will be used in compliance with all applicable anti-terrorist financing and asset control laws, statutes and executive orders.”**

### AGENCY DIRECT FUNDRAISING POLICY

#### Intent

The intent of this agreement is to adapt current fundraising agreements to the new community impact model and foster a spirit of cooperation within our current system. United Way does not wish to regulate fund raising that has little impact on workplace giving. It is the position of this agreement that, in good faith, agencies will not engage in any development activities that would interfere with United Way's workplace efforts.

#### Agreement

- Member agencies will dedicate as much staff and volunteer effort as possible, in support of each other, to increase community giving from September to November.
- Agencies agree to grant United Way exclusive rights and leadership of the workplace campaigns.
- Member agencies agree to co-market with all fundraising activities as noted in the agency agreement and clearly identify themselves as a United Way agency.

## **DONOR DESIGNATION POLICY**

United Way of Lane County conducts an annual, community-wide campaign for the purpose of raising funds and recruiting volunteers. The objective is to increase good will and public involvement and commitment to community goals by addressing high priority health and human care issues in Lane County, Oregon. Donor designations are offered within that context as a service to our donors.

### **Accepting Donor Designated Gifts**

United Way of Lane County will accept donor designated gifts within the framework of the following choices:

- a designation to the Live United Fund
- a designation to a specific action area (Education, Income, Health)
- a designation to a specific eligible organization or another United Way
- a designation to exclude a specific United Way participating agency from receiving any portion of a donor's gift

A donor may designate all or part of their gift.

### **Eligibility Criteria**

Organizations must meet the following criteria to be eligible for receiving designations through the United Way campaign:

- Contributions to the organization must be fully tax deductible to the donor. Specifically excluded in accord with this policy are political campaigns, political action groups, tuition, dues, or other payment for services.
- The organization must be in compliance with all necessary registration and filing requirements for charitable organizations.

United Way reserves the right to review the status of any organization at any time as it relates to eligibility for designations.

### **Promotion of the Donor Designation Program**

Organizations—both United Way participating, as well as non-United Way—are expected to promote the United Way concept when engaged in activities surrounding the campaign. United Way of Lane County reserves the right to deny eligibility for designated funds to any organization that engages in or encourages activities designed to result in direct designations to their own organization through the annual United Way campaign.

### **Service Fees**

United Way will forward designated gifts to specific agencies on a quarterly basis. Payouts will be based on the actual cash collected from donors less a service fee to help cover the fundraising and administrative costs. The amount of the fee is dependent on the amount of the donor's total gift or their employer.