



# United Way of Kentucky

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- United Way of the Bluegrass
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- Ohio Valley United Way
- United Way of Paducah-McCracken County
- United Way of South Central Kentucky
- United Way of Southeastern Kentucky
- United Way of Southern Kentucky
- United Way of Woodford County

July 21, 2004

Beth O'Donnell  
 Executive Director  
 Environmental and Public Protection Cabinet  
 Public Service Commission  
 211 Sower Boulevard  
 P.O. Box 615  
 Frankfort, Kentucky 40602-0615

RE: Case No. 19000343

Dear Director O'Donnell:

On behalf of United Way of Kentucky and the United Way 2-1-1 Steering Committee, I submit this report for your review. An electronic copy of this report has also been sent. We appreciate the opportunity to lead the statewide implementation 2-1-1 – a three digit dialing code linking people in need with available health and human service resources.

Sincerely,

Lynn Carol Ray  
 Director of Government Relations  
 United Way of Kentucky

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PUBLIC SERVICE COMMISSION

**Report to the  
Kentucky Public Service Commission**

**From**

**United Way of Kentucky**

**2-1-1 Statewide Implementation**

**July 23, 2004**

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## **Executive Summary**

United Way of Kentucky seeks to create a statewide telephone-based information and referral (I&R) system in Kentucky through the use of the “2-1-1” dialing code so that citizens of the Commonwealth of Kentucky have quick referrals to government, non profit, and faith based initiatives that can provide help. The Kentucky Public Service Commission recognized United Way of Kentucky as the lead agency for statewide implementation of 2-1-1 through its Order issued on July 16, 2001.

United Ways in states across America have taken the lead on 2-1-1 implementation. United Way of Kentucky benefits from this nation-wide United Way initiative, and also from the support and leadership of United Way of America in partnership with the Alliance of Information and Referral Agencies (AIRS). United Way of Kentucky has been granted authority by the United Way/Airs Partnership to use the official 2-1-1 logo in the statewide implementation of 2-1-1.

### **United Way of Kentucky 2-1-1 Business Plan**

The United Way 2-1-1 Steering Committee (the Committee) will build on an existing infrastructure to maximize current and future resources dedicated to information and referral services. A 2-1-1 business plan has been completed.

The Committee’s vision for Kentucky 2-1-1 is a robust statewide system, made up of three new 2-1-1 Call Centers plus the enhancement of an existing Call Center in Northern Kentucky, and a localized community resource management component that will focus exclusively on identifying, updating, and monitoring available health and human service resources. One statewide database, housed in a central location, will be accessed by all Call Centers. Community leaders in Louisville, Lexington, Northern Kentucky, and Southeast Kentucky are working diligently to launch 2-1-1 across Kentucky.

United Way of Kentucky will use a rigorous process that meets national 2-1-1 standards and guidelines when approving the application of a Call Center. Call Centers will be required to be accredited by AIRS, which includes an external professional review of a program’s service delivery, resource database, reports and measures, cooperative relationships and governance.

United Way of Kentucky’s relationship with all Call Centers will be contractual, and will outline the relationships, mutual responsibilities, terms, and process for renewal and termination for the Call Center to be accessible through the use of the 2-1-1 dialing code.

Call Centers in Louisville, Lexington, and Northern Kentucky will serve 1.9 million Kentuckians, nearly half of our state population. The Call Center in Southeast Kentucky will serve the rural population of the state – 2.2 million. One Call Center will operate twenty four hours, seven days a week. The other Call Centers will direct their calls to this Call Center after hours and on weekends and holidays.

## **Costs and Funding**

Existing I & R Call Centers in Louisville and Lexington (soon to be transitioned to 2-1-1) and in Northern Kentucky (already 2-1-1 in four counties) are supported by an estimated \$750,000 annually from philanthropic and other United Way grants and fees for services.

Based on AIRS projections of between \$1 and \$1.50 per person per capita and reports of actual first year and start up costs of Call Centers in other states, we have estimated the approximate costs to fully implement 2-1-1 in Kentucky to be \$4.5 million. These costs include personnel, software and other technology needs, telecommunications fees, AIRS certification, 800 number calls, 2-1-1 telephone translation costs, up-front cell phone connection, and the cost of compiling statewide resources into one database. We have also included a marketing and promotion campaign to educate Kentuckians about 2-1-1.

## **Technology**

2-1-1 calls will link callers to service providers through a telecommunications network that allows both voice and data. The 2-1-1 number will be translated by the telephone company switches to either a seven digit local number or toll-free number. Transparent to the caller, the 2-1-1 call will be routed to the appropriate Call Center based on area code, exchange prefix, and time of day. Callers will be able to connect to 2-1-1 Call Centers by land line, or by cell phone.

The Kentucky 2-1-1 plan includes Internet Protocol, in partnership with a project currently underway at the Kentucky Housing Corporation that will provide web access to the statewide data base of health and human service resources.

## **Telecommunications Issues**

Kentucky 2-1-1 telecommunications plan is based on the assumption that contracts with telecommunications providers registered to do business in Kentucky will be consistent with BellSouth cooperation and fees. So far, this assumption has held true. The Kentucky Steering Committee has benefited from the positive and helpful guidance from BellSouth and from the Kentucky Telephone Association. Kentucky 2-1-1 has yet to address payphone issues, and issues related to other N-1-1s, such as transferring calls to 9-1-1. Initial contact with the wireless industry has been slow, but positive. Although there is little consistency among wireless providers in the cost of connecting their customers to 2-1-1, the most efficient and cost-effective way to provide wireless access to 2-1-1 statewide is to direct all wireless calls to one Call Center.

## **Barriers to Implementation**

Barriers to statewide implementation of 2-1-1 include the identification of long-term sustainable funding, the challenge of merging existing databases into one statewide database, negotiating contracts across state lines, estimating the cost of toll-free charges, and working with the wireless industry. The downturn of the economy during the last three years has presented a delay in implementation process. However, now that our

business plan is complete, we feel confident in our ability to identify funding for start-up and first year expenses through corporate and foundation funds.

### **National 2-1-1 Perspective**

Access to 2-1-1 is spreading rapidly across the United States. At this time, thirty percent of the U.S. population has access to 2-1-1.

United Way of America and their national partners are making progress in securing immediate and long-term funding for 2-1-1. In recognition of the important role for 2-1-1 in homeland security, the 107<sup>th</sup> Congress included 2-1-1 as an allowable line item in the federal Public Health Security and Bioterrorism Preparedness and Response Act of 2002.

In addition, on September 17<sup>th</sup> of this year (2004), House and Senate Members in the U.S. Congress signed onto the Federal Calling For 2-1-1 Act. This legislative initiative would direct \$200 million to the States for the implementation of 2-1-1. Currently, bills in both House and Senate have broad bi-partisan co-sponsorship. The legislation would require a fifty percent match from the States.

## **Table of Contents**

<b>Introduction</b>	<b>1</b>
<b>Kentucky 2-1-1 Business Plan and Status</b>	<b>2</b>
<b>United Way of Kentucky 2-1-1 Steering Committee</b>	<b>3</b>
<b>Costs vs Benefit</b>	<b>4</b>
<b>Funding</b>	<b>5</b>
<b>Technology Plan and Strategies</b>	<b>6</b>
<b>Telecommunications Issues</b>	<b>7</b>
<b>Barriers to Implementation</b>	<b>8</b>
<b>National 2-1-1 Status</b>	<b>9</b>
<b>Resources</b>	<b>12</b>
<b>Attachments</b>	

## **Introduction**

On July 20, 2000, the Federal Communications Commission (FCC) assigned the 2-1-1 abbreviated dialing code for access to health and human service information and referral services. On February 21, 2001 and May 11, 2001, the Kentucky Public Service Commission held informal meetings to discuss the assignment of 2-1-1. United Way of Kentucky formally submitted a petition asking the Commission to assign the 2-1-1 dialing code to United Way of Kentucky and affiliate organizations. United Way of Kentucky proposed to be the lead agency for the statewide implementation of 2-1-1.

The Commission ordered that:

1. The proposal by United Way of Kentucky is accepted for a pilot period of 3 years, implementation to begin immediately.
2. The Commission will evaluate the effectiveness of, and progress in, United Way of Kentucky's implementation of I&R services in this Commonwealth 3 years from the date of this Order.

The petition was granted in Frankfort on the 16<sup>th</sup> day of July, 2001.

This report is intended to satisfy the direction of the Kentucky Public Service Commission Order that United Way of Kentucky report on its progress.

With this report, United Way of Kentucky will describe the status of 2-1-1 in Kentucky and nationally, with specific details about a statewide business plan and barriers to implementation.

## **Kentucky 2-1-1 Business Plan and Status**

In August, 2003, United Way of Kentucky held a statewide meeting of 2-1-1 stakeholders, health and human service providers, state and local government leaders, United Ways and other non profit executives to discuss 2-1-1 and begin the development of a plan for implementation. Earlier work had been done through convening meetings and conference calls with the telecommunications industry, and working to build I&R capacity within the United Way infrastructure. At the August meeting, leadership for this project was identified and we began to pull together the work of the past into one statewide vision and plan. See Attachment A.

As of this date, four Northern Kentucky counties (Boone, Campbell, Kenton, Grant) have live access to 2-1-1 through the efforts of United Way of Greater Cincinnati/Northern Kentucky, and the generosity of corporate philanthropy in the area.

In the Metro Louisville area, which includes Jefferson, Bullitt, Henry, Oldham, Shelby, Spencer and Trimble Counties, 2-1-1 is ready to launch. All up-front telephone translation fees have been paid. A Louisville Metro-specific business plan is now being developed, potential funding sources have been identified, and the projected date for launching 2-1-1 in this area is April 30, 2005.

The Lexington Call Center, which will serve Anderson, Bourbon, Boyle, Clark, Fayette, Franklin, Jessamine, Madison, Mercer, Montgomery, Scott and Woodford Counties, is in the beginning planning stages. United Way of the Bluegrass has worked diligently to convene meetings with local service providers and other stakeholders. Community non-profit and corporate leaders are at the helm of the Lexington 2-1-1 initiative.

The Call Center in Southeast Kentucky is working to identify funding for a pilot project in 44 counties. The project would partner with the Center for Rural Development. A launch date has not been projected, but planning is currently underway for this Call Center initiative, which has been endorsed by Congressman Hal Rogers.

The statewide plan for 2-1-1 includes the importance of local monitoring of available resources. Kentucky 2-1-1 will designate twenty people, strategically placed throughout the state, whose sole responsibility will be to monitor and update government, nonprofit, and faith-based resources. The Call Centers will only be as successful as the accuracy of available resources. Building on an existing resource management plan, led by United Ways in many communities, an initial mailing will be sent out to confirm information. Follow-up will be done by phone and personal contact, if necessary. Kentucky CARES has a good start on many available health and human service resources, but due to lack of funding has not consistently kept the database current.

The Call Center endorsement process will follow national standards for information and referral, advanced by AIRS, and the National 2-1-1 Coalition. A timeline will be established for Call Centers to meet the accreditation criteria. On site technical assistance to Call Centers working toward certification will be provided by United Way of Kentucky.

AIRS established protocol and expectations will be in full effect to achieve the Kentucky 2-1-1 mission of a statewide system. Stringent guidelines for inclusion in the statewide database will be implemented. The purpose of the Inclusion Policy is to ensure that the 2-1-1 database includes the most complete, accurate and up-to-date information available for I&R Specialists and the 2-1-1 callers they serve. Also required by the accreditation standards of AIRS, the Inclusion Policy will be uniformly and fairly applied and published so that 2-1-1 Call Center staff and the public are aware of the scope and limitations of the databases. One example of the importance of taxonomy is a caller who identifies the need for food. Database protocol will clearly define the differences between a food pantry, a soup kitchen, and a restaurant, and detail the policies that apply for each.

### **Kentucky 2-1-1 Steering Committee**

The Kentucky 2-1-1 Steering Committee (Attachment B) was formed to lead the effort toward statewide implementation of 2-1-1 in Kentucky. The Committee is comprised of representatives from state and local government, nonprofit health and human service organizations, first responders, homeland security, 9-1-1, telecommunications and technology associations. Former Secretary of the Cabinet for Health Services, John Morse, Chairs the Committee. The Committee makes recommendations to the United Way of Kentucky Board of Directors.

The Committee has a sub-group focused on technology. KY CARES has been instrumental in our efforts to design the best plan for merging resource data into one central location. Recently, the Committee formed a partnership with the Kentucky Housing Corporation to link to their efforts to connect low income housing residents to a website of available health and human service resources. Recent discussion has also included the strong possibility of a partnership with the University of Kentucky, where the statewide database of resources would be housed and managed.

Presentations, both formal and informal, have been made by United Way and 2-1-1 Steering Committee Members at the State Government Cabinet level, Office of Homeland Security, and Governor Fletcher's office. The concept and plan for 2-1-1 is consistently met with support and enthusiasm.

During the 2004 State Legislative Session, the Committee led an effort that resulted in an official "endorsement" of 2-1-1 by the Kentucky Legislature. Resolutions in both the House and Senate passed without a dissenting vote.

## **Cost vs. Benefit**

During the last decade, new realities are painting an alarming picture. A fluctuating employment rate, an increase in the numbers of senior citizens, more families without health insurance, an increase in the numbers of working poor, and an influx of migrant farm workers means that more and more people must seek out new sources of help and opportunities for involvement. These realities indicate a steadily increasing demand for health and human services at the same time that both public and nonprofit service providers are facing the necessity of reductions in those services.

People in need are confronted by the changing availability and eligibility requirements for services and providers that are over-extended and unable to meet demand and often unable to maintain current information on what help may be available from other sources.

The value that 2-1-1 provides in this kind of environment is critical. 2-1-1:

- Provides an easy, visible, and non-judgmental entry point for people who for the first time in their lives need to turn outside their families for help;
- Increases efficiency by helping callers clearly define their needs and points them to the best places for help;
- Relieves some of the burden on service providers by reducing the number of calls from people who either are not eligible for their services or who are seeking services they do not provide;
- Creates knowledge about needs and gaps in services that can help policy-makers and community leaders make better decisions and more effectively plan for the future.

State government leaders have expressed the need for a three digit dialing code that would help people navigate the often confusing maze of health and human service resources available to them. We know from reading documents about 2-1-1 in other states that it has saved state government dollars by eliminating duplication of services, reducing the number of 800 lines tied to government programs, and increasing the efficiency of working with private sector organizations.

In some states, 2-1-1 has a contract with State government for pre-qualifying callers for Medicaid, managing the tobacco quit line, or managing a public health epidemic by directing callers to local clinics where free vaccinations are available. In all cases such as these, the public-private 2-1-1 partnership has reduced the burden on government staff to directly manage these important initiatives.

According to a study by the University of Nebraska Public Policy Center, 2-1-1 will result in benefits to individuals, employers, nonprofit agencies and government valued at \$4.32 to \$9.64 per capita per year. Similar studies have been conducted across the United States that project a public benefit of millions of dollars in annual savings. United Way of America is in the process of developing a national cost/benefit analysis for 2-1-1, which should be available in the fall.

## **Funding**

United Way of Kentucky has developed a detailed line-item budget for first year operating and start-up costs for a statewide 2-1-1 system. Our budget can be found in Attachment C. We anticipate an approximate \$4.5 million to fully implement 2-1-1 in Kentucky.

Call Center budget estimates are based on the assumption that ten percent of the population in the area served will make one 3 minute call in the first year. The budget includes a marketing/promotion plan. The budget does not include the cost of long distance calls to and from community resource management centers, housed at local United Ways. This missing information is a current barrier to the development of a final budget.

United Ways in Louisville, Lexington, and Greater Cincinnati/Northern Kentucky invest over \$500,000 annually in existing I&R services. In addition, the 2-1-1 Call Center in Greater Cincinnati/Northern Kentucky receives funding from the Council on Aging, the Health Foundation of Greater Cincinnati, and a small in-kind service donation from the Hamilton County Mental Retardation/Developmental Disabilities Board. Generous corporate co-sponsorship for 2-1-1 in Greater Cincinnati/Northern Kentucky has been donated by Cinergy – an amount totaling \$600,000 over the next three years.

Total annual United Way, corporate, and foundation dollars for 2-1-1 (Cincinnati/N.KY) and existing I&R call centers in Louisville and Lexington that will soon transition to 2-1-1, amounts to approximately \$750,000 annually. Funding for the Greater Cincinnati/Northern Kentucky 2-1-1 Call Center benefits Cincinnati and surrounding counties, including four counties in Northern Kentucky. Our statewide plan will add two additional counties in Northern Kentucky to the Cincinnati/Northern Kentucky call center area.

A localized business plan in the Louisville Metro United Way area is being drafted, and an aggressive fundraising campaign will begin in August to ensure the projected 2-1-1 launch on April 30, 2005.

United Way of the Bluegrass in Lexington recently brought an existing community call center, funded by United Way dollars, into their Lexington office. The call center will be transitioned to 2-1-1 when additional corporate, foundation, and/or local government dollars are secured.

In London, Kentucky, a partnership has begun with Senture, a call center currently receiving calls for Southeast Kentucky 5-1-1, and an American Truckers Association initiative tied to homeland security. Senture is well positioned to add 2-1-1 to their operations. Congressman Hal Rogers has indicated a strong interest in securing funding for 2-1-1 in Southeast Kentucky. Current discussions are progressing toward a pilot project in the London/Southeast Kentucky area.

## **Technology Plan and Strategies**

The strategy that will ultimately connect all Kentuckians to 2-1-1 around the clock, every day of the year requires reconciliation of several factors:

- Information must be collected and updated on a timely basis, as close to the local level as possible;
- Callers must feel comfortable with the sensitivity of referral specialists who must respond to a diversity of cultural values;
- The system must be financially viable, designed to operate as efficiently as possible.

The system design is further complicated by the demographic realities of Kentucky – high population density in the Louisville, Lexington, and Northern Kentucky areas, and low density population throughout rural Kentucky. To best address these concerns, our plan for three call centers – Louisville, Lexington, and London, KY, and enhancing the efforts of the Northern Kentucky call center, will respond well to ensure sensitivity to regional and cultural differences.

There is tremendous value to having I&R services delivered as close to home as possible, but considerations of cost efficiency requires that a fewer number of Call Centers be available to the population of callers. The ability to access one statewide database will enhance the “local feel” of the Call Centers, while presenting tremendous cost savings to 2-1-1 in Kentucky. Cost efficiency also dictates that we have only one call center to remain open after normal business hours. Using call-forwarding technology and an integrated statewide database will ensure full coverage 24/7.

We are committed to building a single, integrated statewide resource database that will serve both Kentucky 2-1-1 and be easily accessible to the public through the Internet. Early meetings with KY CARES have proven fruitful and have led to the exploration of options for merging KY CARES with other existing I&R resource databases across the state.

The benefits of a single statewide database include:

- 24/7 coverage for the entire population;
- System-wide redundancy in case of natural disaster or emergency, allowing all Call Centers to accept and handle calls from any other – extremely important if one or more Call Centers be forced to close;
- A single website that will make the most useful information about services generally available over the Internet;
- A more efficient way to collect and update information about available services from local, state, and national providers through consolidating that function in a single location.

In partnership with the Kentucky Housing Corporation, we are exploring options with a technology firm called One Economy. One Economy operates a system design called Beehive, used in support of 2-1-1 Call Centers in other states.

## **Telecommunications Issues**

Building a telecommunications infrastructure for 2-1-1 is not without challenges. The system we envision will need the following essential components:

- Cost-free to all users;
- Technology that will appropriately point the call to the appropriate call center based on time of day, day of week, location of call, and call volume;
- Redundancy built into the system so calls can be quickly redirected in case of emergency or national security concern;
- Low operational cost;
- Call origination data linked to the database to allow quick and efficient location of services.

Our current projected costs are based on the budget assumption that telephone company charges for up-front translation fees, toll-free calls to Call Centers, and other telephonic needs will be comparable to BellSouth fees.

### **Wireless Calls:**

Wireless calls will translate to a statewide 1-800 number and be routed to one Call Center. Wireless providers have submitted cost estimates for initial start up – connecting callers to the 2-1-1 dialing code – anywhere from no charge, to “no more than \$14,000.” Most providers have estimated costs to be somewhere between \$500 and \$1,000 per switch. The one-call-center infrastructure results in tremendous cost savings, and has eliminated many of the problems that 2-1-1 initiatives in other states have encountered.

### **Public Phone Calls:**

The ability to connect hospitals, hotels and pay phones to 2-1-1 have been included in our plan and have been included in the Louisville Metro area. We anticipate cooperation from telephone service providers statewide. There will be no charge for these calls to the caller.

## **Barriers**

United Way of Kentucky has encountered certain barriers to implementation of our original plan, submitted to the Public Service Commission in July of 2001. As a result, we have amended the implementation plan to include the option of a pilot project, and have extended the official launch dates for the Louisville Call Center to April 30, 2005. United Way of Kentucky, working with the Kentucky 2-1-1 Steering Committee remains dedicated to full statewide implementation of 2-1-1. We anticipate 2-1-1 reaching fifty percent or more of the Kentucky population by July of 2005.

Key barriers to statewide implementation remain center around available funding, the need for an up-to-date database of state and local government resources, negotiating with the wireless industry, cross state border issues, and partnering with other N-11s. Current economic conditions have created a double hit for many nonprofits and business corporations in Kentucky. The economic downturn has decreased the amount of money available for philanthropy. The increase in unemployment and budget cuts for other services has increased the demand for human services.

The remaining barrier to implementation by Metro United Way in Louisville is the identification of sufficient start-up and first year operating funds, difficulty in negotiating a contract with the Indiana 2-1-1 partnership for 2-1-1 services in three Southern Indiana Counties, and wireless connection to 2-1-1.

The remaining barrier to full implementation for Northern Kentucky is the need to add two additional counties to the service area (Pendleton and Gallatin), and finalizing negotiations with the wireless industry.

The London Call Center is very close to identifying available resources for a pilot project, but has not fully negotiated a contract with their potential funding source.

## **National**

The number of communities with access to 2-1-1 service has increased dramatically each year since the first 2-1-1 was established by United Way of Atlanta in 1998. Early in 2002, only six percent of the American population could access 2-1-1 service. By the end of 2002, more than 51 million Americans in 20 states could dial into 2-1-1 for access to community information and referral services.

In 2002, thirty three new 2-1-1 systems were launched in 13 additional states. This represents an 83% increase over the number of 2-1-1s launched in 2001. Currently, 30% of Americans have access to 2-1-1.

The two primary national leaders in 2-1-1 - United Way of America and the Alliance for Information and Referral Systems – released the National 2-1-1 Business Plan in 2002. This national plan provides a roadmap for state 2-1-1 development across the country. Collaboration among key stakeholders and funding from public-private partnerships remain the two key components of the plan.

### **2-1-1 and Homeland Security**

The tragic events of September 11, 2001, highlighted the critical role for 2-1-1 services in several ways. In Connecticut, the 2-1-1 Infoline assisted families of victims, fielded calls for the Red Cross and other first responders, managed donor and volunteer information, provided training and technical assistance to state employees, and updated databases with related services. Although an 800 toll free number and 2-1-1 were both publicized by Connecticut government leaders, over ninety percent of the callers chose to dial 2-1-1 in Connecticut.

In another related event, when thousands of travelers were stranded at the Atlanta Airport due to the grounding of all aircraft in the days following September 11, 2-1-1 provided valuable links to volunteers who opened their homes to stranded travelers.

On the anniversary of the September 11 attacks, the Brookings Institution and Urban Institute issued a report, “Calling 2-1-1: Enhancing the Washington Region’s Safety Net After 9/11.” This report detailed the challenges faced by dislocated workers within the Washington, D.C. area hospitality industry. The primary recommendation included the creation of a 2-1-1 system in the metropolitan area to streamline access to human services.

## **National Funding from Public and Private Sources**

The future looks promising as National 2-1-1 leaders make progress in securing immediate and long-term funding for 2-1-1. The 107<sup>th</sup> Congress passed the Public Health Security and Bioterrorism Preparedness and Response Act of 2002, including funding for 2-1-1 as an allowable line item.

United Way of America is taking the lead on a national effort within the 108<sup>th</sup> Congress to secure permanent, long-term federal funding for a nationwide 2-1-1 system.

Other national public funding sources currently being explored include the following:

- The National Hopeline Network (1-800-SUICIDE) has enlisted pro bono services of a Washington, DC law firm to develop strategy for working with the FCC to make a case for using a portion of Universal Service Funds (USF) to underwrite certain costs related to 2-1-1 implementation, particularly in rural America.
- Housing and Urban Development (HUD) has just approved the use of Community Development Block Grant (CDBG) funds (approximately \$5 billion nationally) for 2-1-1 in cities, counties and states that receive these dollars.
- National 2-1-1 leaders have held exploratory meetings with the Center for Disease Control's Department of Communications to begin discussion regarding a demonstration project to align 2-1-1 with a specific project in one or more of their 12 scientific centers.
- The Cisco Corporate Foundation has invited national 2-1-1 leaders to submit a proposal requesting funding, products and corporate personnel to four key areas – one of which is the development of a National 2-1-1 Learning Management System.
- National 2-1-1 leaders are in the final stages of developing a major funding proposal to the Bill and Melinda Gates Foundation. The proposed project would support two initiatives: 1) to accelerate 2-1-1 implementation in Washington and Oregon; and 2) to build AIRS capacity to provide Quality Assurance/Capacity Building products and services.

## **Public Service Commission Support**

United Way of Kentucky wishes to thank the Kentucky Public Service Commission for their interest in 2-1-1, and for designating United Way as the lead agency for statewide implementation. Our statewide infrastructure of 25 local United Ways offers us the advantage of implementing a statewide initiative, but with a local presence.

Public Service Commissions in several states have played a direct role in addressing many of the barriers to implementation. For example, the California Public Service Utilities Commission issued a decision requiring all local exchange carriers to provide 2-1-1 call origination services at reasonable rates; ordered that payphone operators must discontinue any incompatible use of 2-1-1 dialing and must route 2-1-1 calls at no charge

to the caller; and has established a series of milestones to help secure the timely and smooth implementation of 2-1-1 services.

In a situation addressing a specific telecommunications provider, the Iowa Utilities Board (IUB) suspended a portion of a proposed tariff by one telephone service provider that would bill 2 cents per call to the agencies operating 2-1-1 referral systems. The outcome of the ruling defined 2-1-1 as a basic telecom service along with 9-1-1 emergency access and suggested the telecom's costs would be more appropriately recovered through surcharges on their basic service rates than through charges billed to the public interest agencies. The company withdrew its tariff pricing request and decided to treat 2-1-1 as a cost of doing business.

Resources/Acknowledgements:

National 2-1-1 website, <http://www.211.org>

*Calling 211: Enhancing the Washington Region's Safety Net After 9/11*, a report prepared by the Brookings Institute.

<http://www.brook.edu/dybdocroot/washington/hospitality.html>

*2-1-1 State by State: A Periodic Report on the National Implementation of Three Digit Accessed Telephone Information and Referral Services*, a report prepared by the Telecommunications and Information Policy Institute, University of Texas at Austin, <http://www.utexas.edu/research/tipi>

Thanks to Lucinda Nord and the Indiana 2-1-1 Partnership

# **Attachment A**



## **Kentucky 2-1-1 Business Plan**

Streamlining Access to Health and  
Human Service Information and Referrals



## Purpose and Introduction

2-1-1 is an easy to remember three-digit dialing code assigned by the Federal Communications Commission (FCC) that simplifies and organizes the process of connecting people to important services, community needs and civic involvement opportunities.

### Contents

2-1-1 — What Is It?	
Connecting People .....	Page 3
Community Planning .....	Page 4
Disaster Response .....	Page 5
Civic Involvement .....	Page 6
Where Are We Now?	
History .....	Page 7
Cost—Benefit	
Cost-Benefit .....	Page 8
Kentucky's Vision & Plan	
2-1-1 Today .....	Page 9
2-1-1 Tomorrow—Call Center Operations.....	Page 10
Map .....	Page 11
2-1-1 Tomorrow—Resource Development Operation.....	Page 12
Committee & Partners.....	Page 13
Roll Out	
Building Regional Support .....	Page 14
Educational Campaign	
Educational Campaign.....	Page 15
Management/Oversight	
Management/Oversight .....	Page 16
2-1-1 Budget	
What Will It Cost?.....	Page 17
Budget Narrative .....	Page 18
Budget Summary .....	Page 23
Louisville Call Center Budget .....	Page 24
Lexington Call Center Budget .....	Page 26
London Call Center Budget.....	Page 28
Northern Kentucky Call Center Budget .....	Page 31
Resource Development Budget.....	Page 33

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2-1-1 — What Is It?

## 2-1-1 Access to Health and Human Services

2-1-1 connects people to professionals trained in navigating the confusing maze of health and human services. These services address diverse needs such as food banks, employment, clothing closets, adult daycare, shelters, and rent assistance. 2-1-1 calls cover a wide spectrum of needs, including:

A social worker in a nursing home reports that an elderly man has broken his glasses and cannot afford a new pair. Who could pay for new glasses?

A Human Resources manager surveys the company's supervisors and learns that most third-shift absenteeism is caused by childcare issues. Where can he find information about quality childcare close to the plant that operates at night and on the weekends?

Parents worry that their teenage son may be taking drugs. What can they do to help their child?

A young woman with three small children has just been abandoned by her husband. He has taken the car and the checkbook. Where can she go to find help?

A single business owner with a home office is fighting breast cancer and is too sick to work. If she loses her house, she loses her business. How does she survive without income?

Three simple digits, 2-1-1, connect the community to a universal service that provides critical quality information to people in a confidential, convenient way—and doesn't label them as sick, poor, abused, old or in any other way—everyone uses 2-1-1.

# Connecting People



# Community Planning

## A Community Planning Tool

2-1-1 can track and record information from its callers, resulting in rich aggregate data about the types of calls a 2-1-1 call center receives, the people who make those calls, what resources are currently available and where they are located. This information is of great value to a community for:

**Anticipating changing demand for services.** Public policy makers and community leaders can identify emerging gaps in services and be proactive. (Connecticut publishes a “Social Barometer” using 2-1-1 information to describe and predict the state’s collective community needs.) Private sector product development and marketing professionals can use the data to identify shifting trends and new consumer needs.

**Identifying resources to meet those changing needs.** Public policy makers can use 2-1-1 data to forecast where resources may need to be re-deployed or developed in order to meet new community needs.

**Providing information for the community’s grant writers and other resource developers.** Most funders require data to substantiate the need for requested funds. 2-1-1 can provide what resource developers are always looking for: current *local* data about a community need that is accurate and credible.

2-1-1 provides callers with information about and referrals to human services for every day needs in times of crisis.



# Disaster Response

## A Disaster Response Tool

2-1-1 is a critical information system before, during, and after a community crisis such as a terrorist attack, disease outbreak, flood, fire, or other tragedy.

Congress has already defined a role in homeland security for 2-1-1 when it deemed 2-1-1 an allowable use of funds in the Bioterrorism and Public Health Preparedness Act of 2002.

During the crisis, 2-1-1 is a central clearinghouse for information. 2-1-1 connects callers with disaster officials and response and recovery operations as appropriate. 2-1-1 will also field calls from those who need non-life-threatening emergency help and connect them to community services for direct assistance.

After the crisis, 2-1-1 becomes a gold mine of information to study and understand individuals' actions and community reactions during the disaster. This same database information can also be used to assist in the analysis of the disaster officials' response to the crisis and how efforts could be improved in the future.

The value of 2-1-1 as a disaster response tool was particularly clear in the aftermath of September 11, 2001. In New York, *more than 400 help lines* sprang up to help victims and their families, which resulted in confusion about how to get help, rather than providing easy access to organized assistance. Meanwhile, nearby Connecticut's single statewide 2-1-1 line provided easy to use, organized access to field back-up calls for the American Red Cross and other first responders. In addition, Connecticut's 2-1-1 system handled thousands of calls from people whose lives were not in danger, but still needed help.

At the same time 900 miles away in the city of Atlanta, air traffic from all over the East Coast was suddenly grounded at Hartsfield International Airport. Atlanta's 2-1-1 line handled 14,000 calls that week – 9,000 calls to *get* help and 5,000 calls to *give* help. One result was to match more than 700 families in transit at the airport with Atlanta families who opened their homes to the stranded travelers.

## A Civic Involvement Tool

Real community change only occurs when people in the community care enough about a problem to do something about it. 2-1-1 offers a way to connect volunteers with opportunities to get engaged and make things happen. For instance:

A young professional relocates to Kentucky from another state and wants to volunteer in the community. How does he find volunteer opportunities that would match his interests and availability?

A school system initiative wants to recruit, train and connect 10,000 new volunteers to mentor young children to increase reading skills. How are those large numbers going to be organized and tracked throughout the process?

A talent pool of trained volunteers is instantly accessible through the 2-1-1 database and ready to respond if a disaster strikes the community.

An increase in civic involvement is a key indicator that a community is beginning to develop economically and in its quality of life. 2-1-1 is an essential tool to help the community strengthen and prosper.

# Civic Involvement



## History

- 1998 –Atlanta, Georgia, became the first community in the United States to implement a 2-1-1 information and referral line. Connecticut was the first to launch a statewide 2-1-1 system with a single call center serving the entire state.
- 2000 –A National 2-1-1 Collaborative, led by the Alliance of Information and Referral Systems (AIRS) and United Way of America, successfully petitioned the FCC to designate 2-1-1 as the number to call for human services information and referral, and opportunities for civic involvement.
- 2001 –The Kentucky Public Service Commission designated United Way of Kentucky as the lead agency for the statewide implementation of 2-1-1.
- 2002 –The 107<sup>th</sup> United States Congress recognized the importance of 2-1-1 by including it as an allowable use of funding in the bio-terrorism preparedness legislation.
- 2003 –The Kentucky 2-1-1 Steering Committee was convened and held its first meeting in September to create a statewide 2-1-1 vision and bring it to life.
- The “Calling For 2-1-1 Act” was introduced in September by Senate co-sponsors Elizabeth Dole (R-NC) and Hillary Clinton (D-NY) and House co-sponsors, Richard Burr (R-NC) and Anna Eshoo (D-CA). The Senate bill (S1630) and the House bill (HR 3111) have broad bipartisan co-sponsorship. If passed, the legislation will direct \$200 million to the States for the implementation of 2-1-1 (with a required 50% state match).
- 2004 –2-1-1 Resolutions - SR 144 passed the KY Senate and HR 188 and HR 189 were passed in the Kentucky House of Representatives. The resolutions confirm the endorsement of 2-1-1 among Kentucky policy makers, and call upon our federal delegation to sign onto the “Calling for 2-1-1 Act” in Congress.

Currently, thirty percent of the US population now has access to 2-1-1.

Where Are We Now?

## Cost - Benefit

2-1-1 is an incredible tool offering easy access to an ever-growing maze of human services, assistance in organizing disaster response and recovery, and a systematic way to connect volunteers to the needs of the community.

By simplifying access to services, increasing efficiency, and organizing across regions, a statewide 2-1-1 response system has the potential to save significant private, public and non-profit money every year.

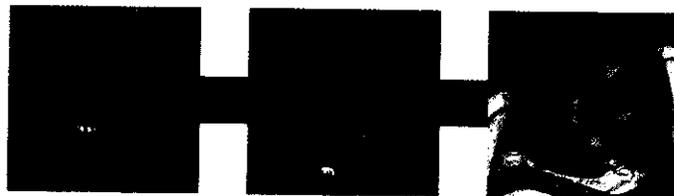
2-1-1 will reduce non-emergency calls to 9-1-1. State 9-1-1 leaders will provide an analysis of cost savings in August, 2004.

2-1-1 has the potential to save state government and nonprofit dollars by eliminating duplication of services, reduction of misdirected calls, and reducing the need for many specialized 800 numbers.

2-1-1 can save scarce local government and non-profit resources by consolidating all information into one statewide data base making all the information available 24 hours a day, seven days a week.

According to a study by the University of Nebraska Public Policy Center, 2-1-1 will result in benefits to individuals, employers, nonprofit agencies and government valued at \$4.32 to \$9.64 per capita per year. Similar studies that have been conducted across the United States project a public benefit of millions of dollars in annual savings. Currently a cost-benefit analysis is underway; we hope to have this report available mid- to late-summer.

# Cost - Benefit



## 2-1-1 Today

Only 29 of 120 counties in Kentucky have access to information and referral call centers. Currently there are multiple locally-driven 2-1-1 initiatives in the planning stages or already operating.

Four Northern Kentucky counties – Boone, Campbell, Kenton and Grant - have fully operational 2-1-1 services through the efforts of United Way of Greater Cincinnati/Northern Kentucky.

Jefferson, and eight contiguous Kentucky counties – Nelson, Trimble, Carroll, Henry, Bullitt, Oldham, Shelby and Spencer in Kentucky, and Clark, Floyd and Harrison Counties in Indiana - have established a regional telecommunications infrastructure and toll-free help line that will be transitioned to 2-1-1 when additional resources become available.

2-1-1 is in the planning stages in the Lexington Bluegrass area, Bowling Green and South Central Kentucky, Owensboro, Henderson, Prestonsburg, and Somerset.

Representatives from all of these local initiatives are involved in the development of the statewide 2-1-1 plan.



# Kentucky's Vision & Plan

## 2-1-1 Tomorrow—Call Center Operations

The Statewide 2-1-1 Steering Committee is working with the state’s current information and referral infrastructure to develop a plan to make 2-1-1 accessible to the entire Kentucky population, through landline and wireless connections.

To develop this plan, the Kentucky 2-1-1 Steering Committee has divided the state into four geographical regions. [See map on following page.] Each region will have one call center responsible for serving the needs of its region. Louisville, Lexington and London will be new call centers and in Northern Kentucky we will enhance the efforts of an existing 2-1-1 call center. Each regional call center will retain autonomy in the center operations, but will be required to meet the standards set forth by the national Alliance of Information and Referral Systems (AIRS). Certification by AIRS will be required.

Quality statewide information and referrals will be accessible to any caller for all locations throughout the state by networking all 2-1-1 call centers into a single database. The human services available through government agencies, non-profit, for profit and faith based organizations will be included in this statewide database.

Discussions with Kentucky’s cellular service providers have indicated the most effective and cost-efficient way to link cell phone customers with 2-1-1 call centers is to direct all cell phone calls to one call center. Cell phone companies will route all of their customers’ calls to one call center. Budget costs for cellular connectivity are based on this “single call center” strategy. With a statewide database accessible to all call centers, the call center receiving the cell phone calls can easily direct the caller to the appropriate resources statewide.

Trend analysis from currently operating call centers throughout the nation shows that peak usage of 2-1-1 occurs weekdays from 8 am until 5 pm. Call frequency drops significantly after 5 pm on weekdays and throughout the weekends.

# Kentucky’s Vision & Plan



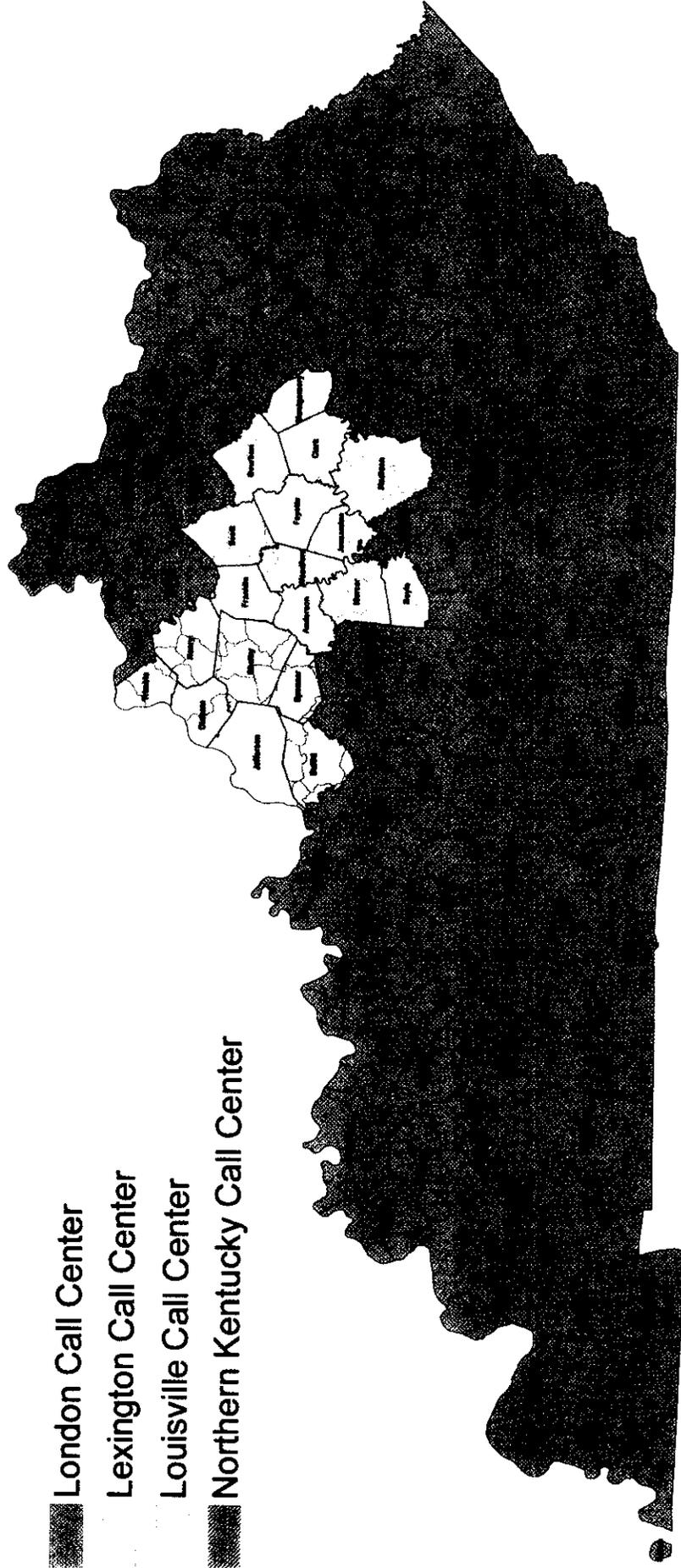
# Kentucky 211 Calling Areas

London Call Center

Lexington Call Center

Louisville Call Center

Northern Kentucky Call Center



## 2-1-1 Tomorrow—Resource Development Operation

Resource Development Specialists throughout the state will focus exclusively on monitoring, updating, and verifying changes in health and human service resources. Specialists will be housed at local United Ways and provide instant updates to the state data base when changes occur. Local government, constitutional offices, non profit and faith based programs and services will be monitored.

Kentucky's proposed 211 system is a collaborative effort drawing on the expertise and strengths of many partners. In order to provide the most accurate and complete information to users of the system, local data collection and verification will be used. This will permit identification of informal (e.g., faith based and mutual support) services that cannot be readily identified and cataloged by staff not familiar with the area used being served.

In order for this model to work, the data from local entities must be in a form that can be aggregated into a central shared database. We propose a cost efficient method that would use a centralized data site based on proven technology which supports centralized resource maintenance. In this model a web enabled database containing the central shared data would be accessed by each site. They would have permission to alter those records they are responsible for – but not the records of other sites, the Taxonomy, Keywords or Service Area schema. The advantages of a central system are:

- Information would be available to staff and the public as soon as it is entered in the system
- Taxonomy updates would be performed once by professional staff and applied uniformly to all records
- Critical fields (e.g., Taxonomy & Keywords) could not be accidentally altered or deleted by field staff
- Only one copy of the Taxonomy would be needed
- Older workstations already in the field could be used for data maintenance as long as they were capable of connecting to the Internet
- There is no need to purchase AIRS approved software for all the workstations
- Additional maintenance sites can be added in the future by simply adding additional user accounts
- In the initial phase of populating the database, a temporary transaction file can be used to hold updates and additions until reviewed and activated by the project manager

# Kentucky's Vision & Plan

## 2-1-1 Partners

The Committee is currently comprised of representatives from the public and private sectors, including homeland security, the Kentucky telecommunications industry, health and human services organizations, and the federal government .

John Morse of the University of Louisville, Office of Health Policy, chairs the Committee.

Members include representatives from:

- United Way of Kentucky
- Kentucky Office for Security Coordination
- Governor's Office of Technology
- BellSouth Telecommunications
- AT&T Wireless
- Mental Health & Health Care Advocacy
- Cabinet for Health and Family Services
- City of Winchester, City Manager
- CMRS Board – 911 (9-1-1 for Cell Phones)
- American Red Cross – Kentucky
- Kentucky Telephone Association
- United Way of the Bluegrass
- United Way of Greater Cincinnati/Northern Kentucky
- Metro United Way
- Kentucky Housing Corporation

The committee's plan to expand support for 2-1-1 will include outreach to potential partners such as:

- Private corporations,
- State and local government,
- Faith based organizations,
- Aging and senior citizen services,
- Regional and local crisis lines,
- Kentucky Library Association,
- Association of Child Care Resource and Referral Agencies,
- Center for Rural Development,
- Mental health and substance abuse organizations,
- AARP
- Kentucky League of Cities

Staff from the United Way of Kentucky, in partnership with local stakeholders, will assume the responsibility to expand the partnerships and initial support for 2-1-1.

# Committee & Partners

# Roll Out

## **Building Regional Support**

United Way of Kentucky and the Kentucky 2-1-1 Steering Committee plan to host meetings in all regions, seeking input, support and partnership opportunities from stakeholders, including existing help lines and information and referral call centers.

## **2-1-1 Call Center Application Process**

Call center designation will be awarded based on universally accepted 2-1-1 call center standards of operation. A timeline will be established for call centers to meet the accreditation criteria. The purpose of the Inclusion Policy is to ensure that the 2-1-1 database includes the most complete, accurate and up-to-date information available for I&R Specialists and the 2-1-1 callers they serve.

## **Criteria for 2-1-1 Designation**

Call Centers must be willing to operate under AIRS standards and must be willing to work towards AIRS accreditation. AIRS standards take into consideration the fact that Information and Referral (I&R) providers today have expanded means for bringing people and services together and they are serving a wide range of inquirers. At one end are people who need help finding appropriate community resources within a complicated array. At the other end are those who have the technological means and understanding to navigate through information systems on their own.

2-1-1 consumers include not only people in need, but service providers, community planners, researchers, media, policy makers, clergy, and others. AIRS sets forth clearly defined service delivery standards that include call intake, referral provisions, client advocacy/intervention, and follow up. AIRS standards include call center hours of operation, and procedures for the development, maintenance and use of an accurate, up-to-date resource database that includes information about available community resources, the services they provide and conditions under which services are available. AIRS standards defines cooperative relationships within the I&R system and local service delivery system, and establishes a list of critical skills for call specialists.

## **Funding**

An aggressive fund raising effort will begin in May, 2004 and will continue until funding for start up and first year costs are secured. Funds will initially be directed to areas of highest population.

## 2-1-1 Public Education Campaign

Communicating the availability of 2-1-1 will be almost as important as operating the call centers themselves. Without an adequate and impactful media campaign to promote 2-1-1, call centers—and the true purpose for the program—will go underserved.

Because of United Way's unique position in most Kentucky markets—local, regional and statewide media companies usually offer nonprofit rates such as 3-for-1 deals, where United Way receives three placements for the price of just one. United Way of Kentucky's 2-1-1 educational campaign will also be supplemented by local United Ways throughout the state promoting 2-1-1 in their local materials, such as local United Way web sites and print materials. United Way of Kentucky, working with local United Ways throughout the state, will also coordinate and produce public service announcements for radio and television stations throughout Kentucky to enhance the public's awareness.

With the importance of 2-1-1 and its impact on state government, private businesses, nonprofits, and individual citizens, we are estimating a cost of between \$1.5 and \$3 million for this public awareness campaign. This estimate includes:

- A two-week 2-1-1 “media blitz” to spark interest and attention, followed by two weeks of lowered visibility and two more weeks of intense promotion
- A continued educational campaign geared to promote 2-1-1 throughout the year
- Production of promotional materials in the form of advertisements for television, radio and print, and their placement
- Production of promotional materials in the form of public service announcements for television and radio
- A public relations campaign to educate the public about 2-1-1
- Other promotional means as needed

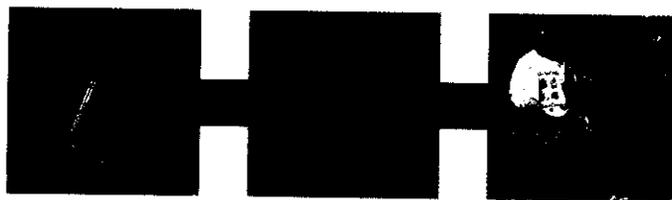
While a statewide educational campaign is costly, it is necessary to build upon the potential of 2-1-1. A quality statewide educational campaign will ensure adequate usage of this important program, and the communities across Kentucky it serves.

# Educational Campaign

## Management/Oversight

United Way of Kentucky was designated the lead agency for statewide implementation of 2-1-1 by the Kentucky Public Service Commission. Our charge is to establish a framework of operation using AIRS standards and practices, seek and build community and state-level support, identify funding sources, award 2-1-1 designation to call centers that meet appropriate standards, and monitor start up and first year operation.

United Way of Kentucky is well suited to provide management over 2-1-1 in Kentucky. We will continue to identify partnerships and seek funding for expanding 2-1-1 call center operations to include additional call center responsibilities. Our responsibilities will include reports to Governor Fletcher, state policy makers and state regulatory authority, including the Kentucky Public Service Commission.



# Management/Oversight

## 2-1-1 What Will It Cost?

Nationally, 2-1-1 services are funded in diverse ways: by state and local governments, United Ways, community-based organizations, state and national foundations, and corporate donations. Based on service area population, national per capita cost estimates by the Alliance for Information and Referral Systems (AIRS) range from \$1.00 to \$1.50. Using the following budget assumptions, the Kentucky 2-1-1 Steering Committee has developed a budget for start-up and first-year costs for each region that falls below this national range.

### Budget Assumptions

1. Each region will experience full start-up costs and has no existing resources.
2. The telecommunications translation costs for all telephone service providers will be comparable to the Bell South fees incurred in the Louisville, Kentucky, area.
3. Ten percent of each region's population will call 2-1-1 once during the first year of operation.
4. A single call center will handle all cellular calls statewide.
5. A single call center will provide evening and weekend 2-1-1 services statewide.
6. Resource Development Specialists will be housed in local United Ways.

Note: The Committee does not expect the costs to provide 2-1-1 services to decrease in the second year. While no start-up costs will be incurred in year two, national trends show up to a 40% increase in call volume once a marketing plan is implemented.

# 2-1-1 Budget



## **Attahment B**

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# **Attachment C**

## 2-1-1 Budget Narrative – Start Up and First Year Costs

### Personnel: \$1,686,000

#### Call Specialists - \$616,000 – 22 Call Specialists @ \$28,000 annual each

Budget projections for personnel are based on the assumption that in the first year of service, ten percent of the population will make one three minute call per year for information and referral. This budget assumption reflects the budget analysis of the Alliance For Information and Referral Services (AIRS). Call center volume is projected to increase each year in the more populated areas and with a planned marketing and promotion campaign.

#### Louisville Call Center

Total Population	1,088,952
Annual Calls	108,895
Calls per Month	9,075
Calls per Week (4wk/mo)	2,268
Calls per Day (5 day/wk)	453
Calls per Hour (6.75 hrs/day)	67
Calls per Person/Hour	16

Four Call Specialists will be prepared to receive 16 three minute calls each per hour = 48 minutes out of each hour phone time. Post call follow up is included in staffing analysis.

#### Lexington Call Center

Total Population	629,653
Annual Calls	62,965
Calls per Month	5,247
Calls per Week (4 wk/mo)	1,311
Calls per Day (5 day/wk)	262
Calls per Hour (6.75 hrs/day)	38
Calls per Person/Hour	12

Three Call Specialists will be prepared to receive 12 three minute calls each per hour = 46 minutes out of each hour phone time. Post call follow up is included in staffing analysis.

#### London Call Center

Total Population	2,199,032
Annual Calls	219,903
Calls per Month	18,325
Calls per Week (4 wk/mo)	4,581
Calls per Day (5 day/wk)	920
Calls per Hour (6.75 hrs/day)	159
Calls per Person/Hour	12

A total of thirteen call specialists will be needed. Nine call specialists will be prepared to receive 11 three minute calls each per business hours = 33 minutes of out of each hour phone time. Post call follow up is included in staffing analysis.

The London Call Center will operate 24 hours a day, 7 days per week. Call Centers in Louisville and Lexington will forward all calls to the London Call Center on weekends and after business hours. It is estimated that call volume on nights and weekends will be extremely low and first year projections are based on 3% of all calls coming into the London call center at night and on weekends.

Total Calls Annual	429,796
Nights/Weekend Calls (3%)	12,893
Calls per Month	1,074
Calls per Week (4 wks/mo)	268
Calls per Day (7 nights/weekends)	38

For staffing purposes, four call specialists have been added to the London budget to answer calls at night and on weekends. The need for staffing three shifts has been incorporated into this formula.

Northern Kentucky – Enhancing the efforts of the Greater Cincinnati/N.KY 2-1-1 Call Center to reach additional Kentuckians

Total Population in area served	380,329
Annual Calls	38,033
Calls per Month	3,169
Calls per Week (4 wks/mo)	792
Calls per Day	158
Calls per Hour	23

Two Call Center Specialists will be funded in Northern Kentucky. Each Call Center Specialist will be available to receive 11 three minute calls per hour = 33 minutes of call time per hour. Post call follow up included in budget.

**Resource Development Specialists – \$560,000** - 20 Resource Development Specialists @ 28,000 each. Housed at local United Ways with sole responsibility of tracking and monitoring changes in health and human service resources.

**Call Center Managers \$114,000** – 3 Managers @ \$38,000 each - one in each call center

**Resource Development Manager – \$40,000** - 1 Manager @ \$40,000 responsible for statewide resource development

**Administrative Assistants - \$75,000** – 3 Assistants @ \$25,000 each – one in each call center.

**Fringe Benefits - \$286,600** – all call center, resource development staff, and state manager @ .20% - health insurance, payroll taxes, other benefits have been computed at 20% of annual salary.

**Organizational: \$259,500**

**Supplies – \$15,000** - office supplies including pens, paper, paper clips, staples, legal pads, printer and fax supplies

**Printing/copying – \$26,000** - lease of one copy machine in three call centers and costs of copying for resource development

**Postage – \$25,500** - cost of postage for initial mailings to verify and update resources, correspondence to agencies, organizations, AIRS

**Travel/Training - \$32,000** – travel for call center managers and resource development staff. Includes air travel for attending AIRS conferences and training. Mileage computed at \$.375 per mile

**Legal Fees - Pro bono via Senture and United Way**

**Audit - \$9,000** – cost of audit for 3 call centers. Resource Development operations included in local United Way audits

**Computer Consultant - \$8,000** – 100 hours at each call center for 20 hours

**Software Upgrades - \$6,000** – at 20% of system price using the cost of Iris as a guide

**Telephone - \$81,000** – land line expenses for Louisville, Lexington, London and Northern Kentucky Call Centers, based on estimate from Bell South – for toll free calls into the call center, line charges, and maintenance. **At this time we have no estimate of long distance fees for calls made by Resource Development Specialists.**

**Rent - \$40,000** – estimated at \$10,000 each for Louisville and Lexington (1,000 sq ft @ \$10/sq ft; and \$20,000 for London (2,000 sq ft @ \$10/sq ft)

**Insurance - \$5,500** to cover call centers – includes liability (general and professional)

**Utilities - \$6,000** – computed at \$1,000 each for the Louisville and Lexington call centers, and \$2,000 for London

**Office Equipment Maintenance - \$1,000** – computed at \$200 each for Louisville and Lexington and \$400 for London

**Other - \$4,500** – classified advertising, subscriptions, dues for three call centers

**Start Up: \$588,739**

**Office Furniture - \$38,600** – call center work stations (\$1,500 ea) (chairs (\$100 ea), file cabinets (\$50 each) No furniture expenses included for resource development specialists

**Computer Hardware - \$49,500** – desk systems (\$1,500 ea) 1 laptop for each call centers (\$2,500), 1 fax for each call centers (\$500 ea)

**Computer Software - \$15,000** – for 3 call centers – Louisville, Lexington, London - for Iris or equivalent at \$5,000 each

**Computer Needs for Centralized Data Base Operation – \$78,000**

Computer equipment at 20 sites at \$40,000; Server at centralized data base management site \$6,000; Windows 2003 Enterprise server at centralized data base management site at \$2,000; Microsoft SQL Database software at \$5,000; Contract or RFP for web/database developer at \$25,000

**Telecommunications System - \$240,000** - for Louisville, Lexington, London call center operations at \$80,000 each – PBX, voice mail, call accounting

**Training Equipment - \$4,000** – for call centers - 1 TV/VCR and overhead screen each at \$1,000

**Marketing Promotional - \$40,000** – for 4 call centers at \$10,000 each – brochures/ small promotional items

**Contractual - \$20,000** – for 3 call centers – Louisville, Lexington, London - at \$5,000 each – cabling (voice and data)

**AIRS Certification - \$25,000** – for all call center sites and staff; \$5,000 each for Louisville and Lexington; \$10,000 for London; \$5,000 for additional staff at N. KY

**Telecom Translation Fees - \$78,639** call center switching costs for Louisville (remaining for 3 Indiana Counties), Lexington at \$10,380 and London at \$62,580; based on the assumption that costs will be equivalent to Bell South fees. \$1,380 to add counties to N. KY Call Center

**Education Campaign: \$1,500,000** – includes two week media blitz and continued educational campaign designed to promote 2-1-1 throughout the year. Media blitz will include radio, print, and television PSA development

**Administration Fee - United Way of Kentucky – \$100,000** - Reports to Governor Fletcher, state policy makers and state regulatory authority, including the Kentucky Public Service Commission; oversight of state public education (media) campaign; general management of local level resource development component

**Cell Phone Access - \$100,000** - Connecting all Kentucky cell phone customers to one 2-1-1 Call Center.

**Total Personnel, First Year Organizational, Start Up, Public Education Campaign, and Project Oversight Administration Costs: \$4,234,239**

**2-1-1 Budget - Summary**  
**Combined Area Budgets**

(23)

<b>All Areas First Year Operating</b>	<b>\$1,945,500</b>
Personnel - \$1,686,000	
Organizational - \$259,500	
<b>All Areas First Year Start Up</b>	<b>\$588,739</b>
<b>All Areas First Year Expenses</b>	<b>\$2,534,239</b>
Administration Fee - Oversight	\$100,000
Cell Phone Connection - Call Centers	\$100,000
Optional Promotional/Advertising	\$1,500,000
<b>Total:</b>	<b>\$4,234,239</b>

**Louisville**

Personnel	\$210,000
Organizational	\$49,950
<b>First Year Operating</b>	<b>\$259,950</b>
<b>First Year Start Up</b>	<b>\$131,949</b>
<b>First Year Total:</b>	<b>\$391,899</b>

**Lexington**

Personnel	\$176,400
Organizational	\$49,950
<b>First Year Operating</b>	<b>226,350</b>
<b>First Year Start Up</b>	<b>\$136,430</b>
<b>First Year Total:</b>	<b>\$362,780</b>

**London**

Personnel	\$512,400
Organizational	\$99,150
<b>First Year Operating</b>	<b>\$611,550</b>
<b>First Year Start Up</b>	<b>\$210,730</b>
<b>First Year Total:</b>	<b>\$822,280</b>

**Northern Kentucky**

Personnel	\$67,200
Organizational	\$30,450
<b>First Year Operating</b>	<b>\$97,650</b>
<b>First Year Startup</b>	<b>\$31,630</b>
<b>First Year Total:</b>	<b>\$129,280</b>

**Resource Development**

Personnel	\$720,000
Organizational	\$30,000
<b>First Year Operating</b>	<b>\$750,000</b>
<b>First Year Startup</b>	<b>\$78,000</b>
<b>First Year Total:</b>	<b>\$828,000</b>

Budget does not reflect the following:

1. long distance charges for Resource Development Specialists
2. costs associated with oversight of central data management center

<u>2-1-1 Budget</u>	<u>Proposed</u>	<u>Description</u>
<b><u>Personnel</u></b>		
Manager	38,000	call volume backup
Call Specialists	112,000	4 FTE @ 9,075 calls per month
Administrative Assistant	25,000	1 FTE
Sub Total	175,000	
Fringe Benefits	35,000	Taxes, Health, Pension @ 20%
<b>Total Personnel</b>	<b>210,000</b>	
<b><u>Organizational</u></b>		
Supplies	2,250	office supplies
Printing/Copying	4,000	lease one machine/printing
Postage	3,500	mailings
Travel/Training	6,000	travel @ .37/mile/AIRS Conference
Legal Fees	0	Pro Bono
Audit	3,000	
Computer Consultant	2,000	20 hours annual @\$100/hour
Software Upgrades	1,500	20% of system price
Telephone	14,000	800 call charges, line charges, maintenance
Rent	10,000	1,000 sq ft @ \$10/sq ft
Insurance	1,500	liability (general & professional)
Utilities	1,000	
Office Equipment Maintenance	200	
Other	1,000	Advertising (classifieds), subscriptions, dues
<b>Total Organizational</b>	<b>49,950</b>	
<b>Total First Year Operating</b>	<b>259,950</b>	
<b><u>Start Up Costs</u></b>		
Office Furniture	9,650	6 workstations (1,500 ea), chairs (100), file cabinets (50)
Computer Hardware	12,000	6 desk systems (1,500), 1 laptop (2,500), 1 fax (500)
Computer Software	5,000	IRIS
Telecommunications System	80,000	Includes PBX, Voice Mail, Call Accounting
Training Equipment	1,000	TV/VCR, Overhead Screen
Marketing/Promotional	10,000	Printing/Brochures/Materials
Contractual	5,000	Cabling (voice & data)/computer
AIRS Certification	5,000	site/staff
Telecom Translation Fee	4,299	cost for Clark, Floyd and Harrison Counties in Indiana
<b>Total Start Up</b>	<b>131,949</b>	
<b>Total First Year Expenses</b>	<b>391,899</b>	

**Area - Louisville**

<b>LOUISVILLE CALL CENTER</b>		<u>Calculations of time for Full time Staff</u>	
Jefferson	698,080	Annual Number of work days	260
Bullitt	63,800	Less PTO, Holidays	25
Henry	15,367	Net annual days (260-25)	235
Oldham	49,310	Hours worked per day	8.5
Shelby	35,125	Off Phones	1.75
Spencer	13,523	Hours on phone per day	6.75
Trimble	8,672	Minutes per day (6.75 x 60)	405
	883,877	Minutes per year (405 x 235)	95,175
<u>INDIANA</u>			
Clark	98,198		
Floyd	71,633		
Harrison	35,244		
	205,075		
Total			
Population	<b>1,088,952</b>		
Call Rate			
10% of			
Population	108,895		
Number of			
calls covered			
per month	9,075		
Number of			
minutes			
covered per			
month	27,224		
Number of			
minutes			
covered per			
year	326,686		

<u>2-1-1 Budget</u>	<u>Proposed</u>	<u>Description</u>
<b><u>Personnel</u></b>		
Manager	38,000	call volume backup
Call Specialists	84,000	3 FTE @ 5,247 calls per month
Administrative Assistant	25,000	1 FTE
Sub Total	147,000	
Fringe Benefits	29,400	Taxes, Health, Pension @ 20%
<b>Total Personnel</b>	<b>176,400</b>	
<b><u>Organizational</u></b>		
Supplies	2,250	office supplies
Printing/Copying	4,000	lease one machine/printing
Postage	3,500	mailings
Travel/Training	6,000	travel @ .37/mile/AIRS Conference
Legal Fees	0	Pro Bono
Audit	3,000	
Computer Consultant	2,000	20 hours annual @\$100/hour
Software Upgrades	1,500	20% of system price
Telephone	14,000	800 call charges, line charges, maintenance
Rent	10,000	1,000 sq ft @ \$10/sq ft
Insurance	1,500	liability (general & professional)
Utilities	1,000	
Office Equipment Maintenance	200	
Other	1,000	Advertising (classifieds), subscriptions, dues
<b>Total Organizational</b>	<b>49,950</b>	
<b>Total First Year Operating</b>	<b>226,350</b>	
<b><u>Start Up Costs</u></b>		
Office Furniture	8,050	5 workstations (1,500 ea), chairs (100), file cabinets (50)
Computer Hardware	12,000	6 desk systems (1,500), 1 laptop (2,500), 1 fax (500)
Computer Software	5,000	IRIS
Telecommunications System	80,000	Includes PBX, Voice Mail, Call Accounting
Training Equipment	1,000	TV/VCR, Overhead Screen
Marketing/Promotional	10,000	Printing/Brochures/Materials
Contractual	5,000	Cabling (voice & data)/computer
AIRS Certification	5,000	site/staff
Telecom Translation Fee	10,380	
<b>Total Start Up</b>	<b>136,430</b>	
<b>Total First Year Expenses</b>	<b>362,780</b>	

**Area - Lexington**

**LEXINGTON CALL  
CENTER**

Calculations of time for Full  
time Staff

Anderson	19,561	Annual Number of work days	260
Bourbon	19,576	Less PTO, Holidays	25
Boyle	27,865	Net annual days (260-25)	235
Clark	33,726	Hours worked per day	8.5
Fayette	263,618	Off Phones	1.75
Franklin	48,201	Hours on phone per day	6.75
Jessamine	40,740	Minutes per day (6.75 x 60)	405
Madison	73,334	Minutes per year (405 x 235)	95,175
Mercer	21,047		
Montgomery	23,262		
Scott	35,320		
Woodford	23,403		

Total  
Population **629,653**

Call Rate 10%  
of Population 62,965

Number of  
calls covered  
per month 5,247

Number of  
minutes  
covered per  
month 15,741

Number of  
minutes  
covered per  
year 188,896

Minutes calculated using 3  
minutes per call

<b><u>2-1-1 Budget</u></b>	<b><u>Proposed</u></b>	<b><u>Description</u></b>
<b><u>Personnel</u></b>		
Manager	38,000	call volume backup
Call Specialists business hours	252,000	9 FTE @ 18,325 calls per month
Call Specialists - nights/weekends	112,000	4 FTE @ 1,074 night and weekend calls
Administrative Assistant	25,000	1 FTE
Sub Total	427,000	
Fringe Benefits	85,400	Taxes, Health, Pension @ 20%
<b>Total Personnel</b>	<b>512,400</b>	
<b><u>Organizational</u></b>		
Supplies	4,250	office supplies
Printing/Copying	4,000	lease one machine/printing
Postage	5,000	mailings
Travel/Training	8,000	travel @ .37/mile/AIRS Conference
Legal Fees	0	Pro Bono
Audit	3,000	
Computer Consultant	2,000	20 hours annual @\$100/hour
Software Upgrades	1,500	20% of system price
<u>Telephone</u>	46,000	<u>800 call charges, line charges, maintenance</u>
Rent	20,000	2,000 sq ft @ \$10/sq ft
Insurance	1,500	liability (general & professional)
Utilities	2,000	
Office Equipment Maintenance	400	
Other	1,500	Advertising (classifieds), subscriptions, dues
<b>Total Organizational</b>	<b>99,150</b>	
<b>Total First Year Operating</b>	<b>611,550</b>	
<b><u>Start Up Costs</u></b>		
Office Furniture	17,650	11 workstations (1,500 ea), chairs (100), file cabinets (50)
Computer Hardware	19,500	11 desk systems (1,500), 1 laptop (2,500), 1 fax (500)
Computer Software	5,000	IRIS
Telecommunications System	80,000	Includes PBX, Voice Mail, Call Accounting
Training Equipment	1,000	TV/VCR, Overhead Screen
Marketing/Promotional	10,000	Printing/Brochures/Materials
Contractual	5,000	Cabling (voice & data)/computer
AIRS Certification	10,000	site/staff
Telecom Translation Fee	62,580	
<b>Total Start Up</b>	<b>210,730</b>	
<b>Total First Year Expenses</b>	<b>822,280</b>	

**Area - London**

## LONDON CALL CENTER

Adair	17,348	Green	11,733	Mason	16,916
Allen	18,170	Greenup	36,761	Meade	27,439
Ballard	8,163	Hancock	8,573	Menifee	6,708
Barren	38,749	Hardin	95,724	Metcalfe	10,046
Bath	11,407	Harlan	32,585	Monroe	11,783
Bell	30,114	Harrison	18,079	Morgan	14,204
Boyd	49,603	Hart	17,667	Muhlenberg	31,702
Bracken	8,482	Henderson	44,995	Nelson	38,823
Breathitt	15,886	Hickman	5,200	Nicholas	6,934
Breckinridge	18,952	Hopkins	46,588	Ohio	23,272
Butler	13,158	Jackson	13,778	Owen	10,936
Caldwell	12,913	Johnson	23,356	Owsley	4,761
Calloway	34,392	Knott	17,729	Perry	29,371
Carlisle	5,323	Knox	31,841	Pike	67,803
Carroll	10,223	Larue	13,372	Powell	13,205
Carter	27,055	Laurel	54,313	Pulaski	57,160
Casey	15,773	Lawrence	15,784	Robertson	2,359
Christian	71,267	Lee	7,949	Rockcastle	16,783
Clay	24,264	Leslie	12,281	Rowan	22,265
Clinton	9,667	Letcher	24,934	Russell	16,628
Crittenden	9,223	Lewis	13,944	Simpson	16,666
Cumberland	7,179	Lincoln	24,055	Taylor	23,202
Daviess	91,694	Livingston	9,846	Todd	11,987
Edmonson	11,841	Logan	26,800	Trigg	12,681
Elliott	6,752	Lyon	8,163	Union	15,562
Estill	15,341	McCracken	64,534	Warren	94,730
Fleming	14,095	McCreary	16,993	Washington	11,103
Floyd	42,226	McLean	10,047	Wayne	20,089
Fulton	7,551	Magoffin	13,358	Webster	14,079
Garrard	15,618	Marion	18,427	Whitley	36,636
Graves	37,225	Marshall	30,261	Wolfe	6,936
Grayson	24,410	Martin	12,529		
Subtotal	724,064	Subtotal	782,199	Subtotal	692,769
<b>Total</b>					
<b>Population</b>	<b>2,199,032</b>				
Call Rate 10% of Population	219,903	Number of minutes covered per month	54,976		
Total number of monthly calls	18,325	Number of minutes covered per year	659,710		

Calculations of time for Full time Staff

Annual Number of work days	260
Less PTO, Holidays	25
Net annual days (260-25)	235
Hours worked per day	8.5
Off Phones	1.75
Hours on phone per day	6.75
Minutes per day (6.75 x 60)	405
Minutes per year (405 x 235)	95,175

<u>2-1-1 Budget</u>	<u>Proposed</u>	<u>Description</u>
<b><u>Personnel</u></b>		
Call Specialists business hours	56,000	2 FTE @ 3,169 calls per month
Sub Total	56,000	
Fringe Benefits	11,200	Taxes, Health, Pension @ 20%
<b>Total Personnel</b>	<b>67,200</b>	
<b><u>Organizational</u></b>		
Supplies	2,250	office supplies
Printing/Copying	4,000	lease one machine/printing
Postage	3,500	mailings
Travel/Training	6,000	travel @ .37/mile/AIRS Conference
Legal Fees	0	Pro Bono
Computer Consultant	2,000	20 hours annual @\$100/hour
Software Upgrades	1,500	20% of system price
Telephone	7,000	800 call charges, line charges, maintenance
Insurance	1,000	liability (general & professional)
Utilities	2,000	
Office Equipment Maintenance	200	
Other	1,000	Advertising (classifieds), subscriptions, dues
<b>Total Organizational</b>	<b>30,450</b>	
<b>Total First Year Operating</b>	<b>97,650</b>	
<b><u>Start Up Costs</u></b>		
Office Furniture	3,250	2 workstations (1,500 ea), chairs (100), file cabinets (50)
Computer Hardware	6,000	2 desk systems (1,500), 1 laptop (2,500), 1 fax (500)
Training Equipment	1,000	TV/VCR, Overhead Screen
Marketing/Promotional	10,000	Printing/Brochures/Materials
Contractual	5,000	Cabling (voice & data)/computer
AIRS Certification	5,000	site/staff
Telecom Translation Fee	1,380	
<b>Total Start Up</b>	<b>31,630</b>	
<b>Total First Year Expenses</b>	<b>129,280</b>	

**Area - Northern Kentucky**

**NORTHERN KENTUCKY  
CALL CENTER**      Calculations of time for Full  
time Staff

Boone	93,290		
Campbell	88,604	Annual Number of work days	260
Gallatin	7,836	Less PTO, Holidays	25
Grant	23,620	Net annual days (260-25)	235
Kenton	152,164	Hours worked per day	8.5
Pendleton	14,815	Off Phones	1.75
<b>Total</b>			
<b>Population</b>	<b>380,329</b>	Hours on phone per day	6.75
Call Rate 10% of Population	38,033	Minutes per day (6.75 x 60)	405
Total number of monthly calls	3,169	Minutes per year (405 x 235)	95,175
Number of minutes covered per month	9,508		
Number of minutes covered per year	114,099	Minutes calculated using 3 minutes per call	

<u>2-1-1 Budget</u>	<u>Proposed</u>	<u>Description</u>
<u>Resource Development</u>		
Manager	40,000	Manages Statewide Infrastructure
Call Specialists (20)	560,000	20 @ \$28,000
	Sub Total	600,000
Fringe Benefits	120,000	Taxes, Health, Pension @ 20%
<b>Total Personnel</b>	<b>720,000</b>	
<b>Organizational</b>		
Supplies	4,000	office supplies
Printing/Copying	10,000	20 @ \$500 each
Postage	10,000	Updating twice per year - 700 resources per area
Travel/Training	6,000	travel @ .37/mile/AIRS Conference
Legal Fees	0	Pro Bono
Audit	0	Part of United Way Audit
Telephone		long distance charges for updating resources
<b>Total Organizational</b>	<b>30,000</b>	
Total Annual Organizational	<b>750,000</b>	
<b>Start Up Cost</b>		
Computer Equipment	40,000	20 sites including software
Server (computer)	6,000	
Windows 2003 Enterprise		
Server	2,000	
Microsoft SQL Database		
Software	5,000	
Contract or RFP		
Web/Database Developer	25,000	
<b>Total Start UP</b>	<b>78,000</b>	
<b>Total First Year Operating</b>	<b>790,000</b>	

Resource Development