



2009 Report and Recommendations

Genesee Country Allocations Committee

January 2009

Note: the Board of Directors voted to approve the recommendations of this report in their entirety on January 22, 2009.

GENESEE COUNTRY UNITED WAY ALLOCATIONS COMMITTEE

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Transmittal Statement

To: United Way of Genesee Country Board of Directors

From: Rick Ensmen, Allocations Chair

The report that follows contains recommendations for the investment of funds raised through the 2009 United Way/Red Cross campaign.

This report is divided into four sections:

Executive Summary: delineates key points and issues that affected this year's allocations process.

Summary of the Review Process: describes the process used in arriving at the recommendations.

Allocable Funds: shows how the funds available for allocation were calculated.

2009 Recommended Allocations: summarizes recommended allocations and their use by funded providers.

Allocation Committee members, with support from United Way of Greater Rochester staff, have spent a considerable amount of time and energy in carrying out their responsibilities and have developed responsible recommendations which we submit to the full Board of Directors for consideration.

Executive Summary

This report contains recommendations for the investment of projected funds available from the 2009 United Way/Red Cross Campaign. The work related to the recommendations set forth is carried out through the Allocations Committee. Key points include:

- Total available income is projected at **\$390,884**. This includes \$330,000 in local campaign revenue, 23,833 in commuter dollars, and \$37,051 regional firms income.
- Deductions of expenses related to donor designations, future and past pledge loss, administrative costs, and the American Red Cross's contractual share yield a projected **\$251,161** in funds available for allocations, **\$12,094** less than the **\$263,255** allocated to community-fund providers for 2008. Provider requests for 2009 totalled **\$310,311**.
- The Committee recommends that **\$263,255 be allocated to hold provider allocations even in 2009 with what was allocated for 2008, which will entail taking an estimated \$12,094 out of the contingency fund.**

Summary of the Review Process

Overview:

The allocation recommendations contained in this report are based on projected funds available through projected campaign revenue, as well as a thorough review of provider applications and information gathered through site visits, conferences, and telephone interviews. The reporting requirements for local service providers this year were consistent with last year's.

Application and Review Process:

The application and review process for renewal funding requests spans approximately five months from the initial mailing to the allocation notifications. The major steps in the process included the following:

| | |
|-----------------------------|--|
| August 8, 2008 | Funding applications mailed to agencies. |
| October 6, 2008 | Deadline for submission of provider applications. |
| October and November, 2008 | Volunteers conducted telephone interviews and site visits to selected providers. |
| November 4, 6, and 11, 2008 | Conferences held with selected providers. |
| January 8, 2009 | Funding recommendations developed. |
| January 22, 2009 | Allocations Report presented to Board of Directors. |
| January 26, 2009 | Allocation notices mailed to providers. |

Allocable Funds*

Income

| | |
|------------------|-----------|
| Local Campaign | \$330,000 |
| Regional Firms | \$37,051 |
| Commuter Dollars | \$23,833 |

Total Income \$390,884

Expenses

| | |
|---------------------|----------|
| Pledge Loss Reserve | \$15,932 |
| Administration | \$46,586 |
| Donor Designations | \$42,921 |

Total Expenses \$105,439

Allocable Dollar Total (Income - Expenses) \$285,445

American Red Cross Contracted Share \$34,284

Total Projected Funds Available for Community Fund Providers \$251,161

Total recommended to be allocated to Community Fund Providers \$263,255

Total Recommended to be taken from contingency \$12,094

* The funds available for investment were calculated using projections for local campaign, pledge loss reserve, donor designations, and administrative fee. If the final total is lower than currently projected, the committee recommends that additional contingency fund dollars be used if necessary to maintain investment dollars at \$263,255.

**United Way of Genesee Country
2009 Recommended Allocations**

| Provider | Program(s)/Service(s) supported with United Way funds | Funding |
|--|---|-----------------|
| All Babies Cherished | Material Aid and Rental provides baby supplies for pregnant and parenting women, as well as assistance to families in need for rent and/or security deposits. | \$5,000 |
| Big Buddy Program of Genesee County | The Big Buddy Program matches at-risk youth with adult volunteers, who provide mentoring and the support needed to make healthy life choices. | \$10,000 |
| Boy Scouts of America, Iroquois Trail | Comprehensive Youth Development (Traditional Scouting) develops youths' leadership ability, life skills, and a values system based on the Scout Oath and Law. Participants learn by doing, while recognizing their duty to God, their country, and to other people. | \$17,000 |
| Genesee County CASA for Children | CASA for Children provides volunteer advocates to speak on behalf of abused and neglected children involved in the Genesee County Family Court system and to undertake any and all activities necessary for their health, safety and welfare. | \$3,000 |
| Genesee/Orleans Council on Alcoholism & Substance Abuse | Services include Prevention Programs to senior citizens, including a medication education program. Additionally, a grandparent support group is offered to persons serving as the primary caregivers to their grandchildren. | \$4,000 |
| Genesee-Orleans Ministry of Concern, Inc. | Last Resort Services offers direct financial help, networking and advocacy for all people living at or near the poverty level in Genesee and Orleans Counties. The program assists people in fulfilling their potential and in becoming economically independent and contributing members of their communities.. | \$27,235 |
| Genesee Region Housing Initiatives Committee | The First Time Homebuyer Program provides housing assistance for low income individuals and families in Genesee County. This program is administered locally by PathStone (formerly named Rural Opportunities). | \$7,000 |
| Genesee Region Independent Living Center | Hearing Impairment Services provides sign language classes and interpreters for deaf persons. | \$3,500 |
| Girl Scouts of Western New York | Girl Scouting in Genesee County provides a unique environment where girls develop assets critical to success in an ever-changing world. In partnership with committed adults, girls develop strong values, a social conscience and conviction of their own potential and self-worth. | \$9,270 |
| HomeCare & Hospice | Hospice Services in Genesee County provides specialized medical care and social/emotional support to terminally ill patients. Bereavement services are also provided to family members. | \$9,000 |
| LeRoy Historical Society | United Way funds are used to support educational programs at the LeRoy Historical Society . | * |
| LeRoy-Stafford Senior Citizens | United Way funds are used to support monthly educational programs and activities for the LeRoy-Stafford Senior Citizens . | \$350 |
| Literacy Genesee | Adult Basic Literacy matches trained, volunteer tutors with | \$16,000 |

| | | |
|--|---|-----------------|
| | individuals needing to increase their basic reading, writing, math, computer, daily living, and/or conversational English speaking skills. | |
| Regional Action Phone | 24 hour Crisis, Suicide, Information & Referral Hotline served as a safety net for individuals in need of support, information or simply a listening ear. RAP is “the place to call when you don’t know where to call” with linkages to almost 900 help agencies to meet caller needs. | \$32,500 |
| Salvation Army, Batavia Corps | Emergency Services provides emergency assistance to households that have exhausted their resources. | \$57,000 |
| Salvation Army Service Units-Genesee County | United Way funds are utilized to provide emergency family assistance and summer camping opportunities to low-income children. | \$2,400 |
| YMCA, Genesee Area Family | United Way funds are used to support Aquatics, Adult Programming, After School Care, Youth Programming, Summer Day Camp, Preschool Programming, Residential Camp, and the Prime Time program. | \$30,000 |
| YWCA of Genesee County | United Way funds are used to support Children’s Services and Domestic Violence programming. | \$30,000 |

*Designations only