

RECEIVED
2006 JAN 26 4 11 36
TRA LOUDET ROOM

MEMO TO DOCKET FILE

FROM Patsy Fulton
DATE January 26, 2006
SUBJECT DOCKET NO 05-00141

Attached is a letter that was sent to Chairman Pat Miller May 27, 2005 from Charlie Gray, Interim Chair of East Tennessee Information & Referral, Inc in reference to this Docket, however, since there was no clear reference to this Docket indicated on the letter, it did not get filed in this Docket at that time. It appears that it is pertinent to this case, therefore Staff is filing it in this Docket at the present time (January 26, 2006)

RECEIVED
OFFICE OF
PAT MILLER
MAY 27 2005

May 26, 2005

TN REGULATORY AUTHORITY

Mr. Pat Miller, Chairman
Tennessee Regulatory Authority
460 James Robertson Parkway
Nashville, TN 37243-0505

Dear Mr. Miller

East Tennessee Information and Referral (211) suspended operations on February 25, 2005 due to lack of funding. The board has continued to search for ways to get 211 back on line. After meeting with several of the community leaders and United Way of Knoxville, 211 plans to be back on line in about three weeks.

After reviewing several proposals, the board decided on to work with 211 Nashville to conduct a 90 day pilot using their agents to take the calls. The databases are the same allowing for an easy merge of Knoxville data. The call should be transparent to the caller because all of the Knoxville resources will be at the agents fingertips.

We plan to have a local part time person on hand to talk with agencies and keep data current. Other plans call for contacting surrounding counties to ask for help with funding. 211 will use area United Ways, county governments, businesses, grants and individuals to request funding. We have talked to Sevier County government and Blount County United Way. Knox County Mayor Mike Ragsdale supports these efforts as well.

The pilot funding vote is scheduled for Thursday, May 26, 2005 by the United Way of Knoxville. Enclosed is a copy of our business plan.

Please advise us of any additional information or steps we should take to satisfy any questions the TRA may have for East Tennessee Information and Referral.

Sincerely,


Charley Gray
ETIR Interim Board Chair

enclosure

211 Come Back Business Plan
Nashville Collaboration
Spring 2005

Executive Summary

East Tennessee Information and Referral was the first grass roots and the third 211 service organized in the United States. 211 began taking calls in July 2000 and has continually increased the number of calls answered and people helped. Other cities have used the ETIR model to start their programs. On February 25, 2005 East Tennessee Information and Referral temporarily suspend operations. While this was a difficult decision, it was fiscally prudent and the board remains committed to operating 211 in Knoxville.

Nationally, 211 is gaining momentum. Currently 108 million people have access to this valuable service. There are 145 active 211 systems in 31 states, Washington, D.C., Puerto Rico and Canada.

In order to re-start the program, we have negotiated a 90-day pilot program in cooperation with Nashville 211. The cost for the pilot is \$13,200. To get 211 back in operation an additional \$16,614 is needed. This pilot program can be operational by the first week of June 2005 with an additional expense of \$50,000 to complete the year. In 2006 the annual cost is \$142,000.

The new program would require hiring a part time person locally that would interface with the agencies and manage the database with updated and accurate information. We plan to begin operating on a Monday thru Friday schedule from 7:00 am to 7:00 pm.

The monthly agency meeting would continue to be held and operations locally would continue to be supervised by the management/advisory board. Board reorganization and on-going development is also a large part of the plan.

Upon successful completion, 211 would continue the contract with Nashville 211 at an annual local cost of \$142,000. The cost for local wages, marketing, and Alliance of Information and Referral Services (AIRS) participation would be \$40,000. The Nashville Plan supports statewide networking in the spirit of collaboration and cooperation.

The contracting effort saves about \$90,000 in operating costs, while continuing services in the 865 calling area. There are other benefits to partnering with Nashville 211. They have several AIRS certified call takers. This adds quality and credibility to the service.

The goal is to get 211 back on its feet. The pilot will accomplish that goal. By using the 90 days we will have time to see if the community will provide the base funding and will give the board the opportunity to add new blood. The board plans to bring together area United Ways, governments and municipalities, corporate Sponsors, grants and private donations to fund this program. If this plan does not work, then we will consider transferring the assets to another organization and turning over operations.

The top five needs are Food, Utility assistance, Health/medical, Housing/shelter, Household goods

Marketing

Our Call volume show we have made great strides in improving name recognition. However, we still have a lot of room for improvement. From the user standpoint, people in the community must be made aware of the service. We plan to look at ways to continue and expand cooperation with the area agencies to increase name recognition. Other avenues of getting this message out are needed.

Use a more proactive plan to announce re-start. May look for a spokesperson to help.

To accomplish the goal of name recognition, two board members will lead a team to put together PSA's, TV spots that will tout the name 211. Cindy Hassell at WUOT may be a resource to promote 211 on NPR. New board members will be needed in this area to help develop and carry out this plan.

As part of board development, we will request a board member in each county responsible for 211 to give more active participation in community events.

Service Analysis

Contracting with the Nashville 211 supports the infrastructure of a statewide network and supports the United Way National 211 initiative in East Tennessee. The call center also uses certified Alliance for Information and Referral Service (AIRS) call agents. The Nashville center is also planning to be a certified call center in 2006. This insures the highest quality to those using the service.

Financial Analysis

Since we opened, our budget has been continuously reduced while call volumes have increased. We have reduced our cost by nearly \$90,000 to its current level of \$142,000. Current assets are estimated to be \$24,000, including the database, 6 agent cubicles and 2 supervisor cubicles, 1 round table, 5 gray tables(5 foot), 6 blue chairs, 13 monitors, 9 computers, 10 NEC phone sets, and a server (leased).

United Way of Knoxville has agreed to provide \$13,600 for the coming year, 2005. We have some commitments for funding but, all existing debts must be settled to move forward. An audit is also needed. A check of all current documents associated status as non-profit should be reviewed and brought up to date.

There will be costs associated with beginning again.

Rejuvenation Plan

We plan to pursue funding through five areas:

- Local United Ways
- Government and Municipalities
- Corporate sponsors
- Grants
- Private Contributions

Getting commitments from a blend of these groups will be a good indicator of how this program is viewed by the community. The immediate goal of \$33,000 will allow the program to begin again while work continues to strengthen the board, develop a fiscally sound base and look to expand services and functionality. We may consider access to the database for contributors for grant information.

Program Description

Existing Program

211 is a non emergency information and referral line that helps people get in touch with the agencies that can help. The database houses over 400 agencies and over 1,000 services. The calls have expanded with capabilities of serving the entire 865 area code. Current call levels are in the range of 90 – 100 calls per day. In 2004, 211 handled 41,189 calls.

The call agents also managed the information in the database, updated information and handled calls from agencies with questions. The agency meeting, which was an initiative of 211 when it started in July 2000, was also scheduled and coordinated by the agents. Board member, Kathy Hatfield, has been instrumental in continuing the meeting each month.

The meeting provides a forum for networking among agencies, an opportunity to learn about other work going on in the community, and a time to discuss and fine tune information in the database.

New Program

The proposed new plan will begin with a 90 day pilot program in cooperation with Nashville 211. The total cost is \$33,000 to get even. This includes clearing and resolving all existing debts and gives both parties an opportunity to evaluate the relationship. Most important it gets 211 back in operation in East Tennessee. We feel 211 can be re-started by June 1, 2005.

The new program would require hiring a part-time person to work with local agencies and manage the database information. Hours of operation will be Monday thru Friday schedule from 7:00 am to 7:00 pm.

The agency meeting will continue to be held each month and operations locally would continue being supervised by a management/advisory board.

If this pilot is successful, 211 would continue under the direction of Nashville 211 and the service would cost \$142,000 annually. Local part time wages, marketing, and AIRS participation would be \$40,000. See attached budget.

United Way Knoxville reconvene volunteer allocation panel to re-hear the 211 case for support.
211 board request commitment to funding the cost of the 90 day pilot \$13,200.
10 New Board members in the areas of Funding, Legal, Financial(CPA), and Marketing.
A funding plan to sustain 211 on an annual basis.

Customer/ Market Analysis

Customer

211 has already established itself in the area as a viable service for the community. 211 played a role in providing needed information during the Tank car leak at Turkey Creek in September 2003 and worked directly with the Director of the Knox County Health Department to provide information about flu shot vaccine in October 2004. 211 also worked with other counties to partner people with available vaccine.

Call volumes have continued to increase each month. Calls in December 2004 totaled 3,335. Calls in December 2003 were 1,289 for an increase of 159%. Total calls in 2004 were 41,189 compared to 18,400 in 2003. This is a 124% increase. Part of the large increase was due to 10,000 calls in October 2005 for flu shots. Adjusting for these calls, volume still increased almost 70%.

Board Analysis The core of a good organization is dedicated people, a succession plan, and outreach to the community to stabilize funding. Our board has struggled in some of these areas. Some board members are burning out. The need to expand the board is critical to our success. We have requested assistance from Leadership Knoxville. Once funding is in place, Leadership Knoxville will help us analyze our board recruitment needs.

Strengths

- Core Dedicated to making 211 work for the community
- Hard working, willing to assume responsibility
- Creative and analytical

Weaknesses

- Unable to sustain funding
- Challenged to recruit new board members
- Did not follow up on operations issues

Reorganization of the Board Expand board. Add up to 10 new board members over the next 4-6 months. Set up committees: Funding/Financial, Oversight, Operations, Communications, Marketing, Board Development. Develop job descriptions for each committee. Request a board member from each county to give more active participation. Consider other options of merging board with another group.

211 Re-start 2005 Time Line

| | |
|-------------------|--|
| April 5 | Letter of Intent signed and sent to Nashville 211 |
| April 11 | Appointment set with County Mayor Ragsdale |
| May 9-16 | United Way of Knoxville - Meet with allocation panel and answer questions. Make new funding request. |
| May 4 – 13 | Meet with area United Ways and governments to present plan and request financial and volunteer support. |
| May 16 | Consider planning Car Show fund raiser. |
| June 1-6 | Start 90 Day pilot with 211 Nashville. |
| June 20 | Team Health bill. |
| June 24 | Report from Nashville on first month of Pilot. |
| June 28 | Report to United Way Knoxville. |
| July 22 | Complete the funding plan. |
| July 25 | Report from Nashville on third month of Pilot. |
| July 28 | Report to United Way Knoxville. |
| Aug 4-5 | Decision to continue? |
| Aug 8-9 | If Yes, Team meets with Leadership Knoxville to begin Board Member search. |
| Aug 8-9 | If no, contact Chip Finn. |
| Aug 15 | Begin search to add four new board members for funding and finances. |
| Aug 22 | Add four new board members for marketing. |
| Aug 24 | Report from Nashville on third month of Pilot. |
| Aug 26 | Report to United Way Knoxville. |
| Sept 12 | Add two board members. |
| Sept 20 | Reorganized Board begins planning for Fund raising and awareness improvement. |