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211 San Diego
Sustainable Funding Plan:

April 26, 2010





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211 San Diego Sustainable Funding Plan:

March 30, 2010

Executive Summary

Through the support of the First 5 Commission of San Diego, 211 San Diego has undertaken preparation of a **Long-Term Sustainable Funding Plan** to guide the organization in prioritizing efforts and resources in Fiscal Year 2011.

The Clay Company (San Diego) and Carpi & Clay (Sacramento) were selected by 211 San Diego to assist in preparation of the Plan, and have worked closely with leadership to identify, research and analyze opportunities at the Federal, State, and local levels. The Long-Term Sustainable Funding Plan has been prepared in coordination with the 211 San Diego Business Plan and Development Plan guiding the organization, as well as Strategic Critical Objectives for the coming year.

To date, 211 San Diego has been funded through the generous support of the First 5 Commission, the County of San Diego, fee for service contracts, grants, corporate and non-profit partnerships, and fundraising. With an annual budget of more than \$3 million and a dramatically growing need for service in the community, it is imperative that 211 San Diego identify long-term sustainable sources of funding (defined for this effort as three years or longer) while actively pursuing short-term opportunities.

While client demand is rising in a tough economy, “General Fund” dollars at the local and state level are no longer reliable as long-term permanent funding solutions. Non-profit organizations like 211 have to become more valuable as business partners to government, delivering services for a cost-effective contracted amount that enable government to also function more efficiently, faster, and with less resources that result in a positive impact on the community. This is a critical and necessary change that must be made in order to secure or maintain funding in a time of dramatically shrinking government budgets.

211 San Diego is well positioned to deliver on a value proposition for funders and the community it serves. The organization is recognized as a Statewide and national leader in information and referral services, providing high quality customer service in times of disaster, as well as every day for access to health and social services. 211 San Diego is our region’s one stop shop for people in need. That need is met by real people who deliver real solutions and provide real help. 211 San Diego has earned a reputation for delivering measurable results, solid financial management, and active engagement with State and national information and referral providers on technology, operations, governance and funding.

211 San Diego's leadership in California and the United States will be critical in the coming year in order to pursue local, state, and federal funding opportunities that present the best likelihood for advancing long-term sustainable funding goals:

- Support of HR 211 (Eshoo) – Federal legislation to designate a national 211 Collaborative and appropriate \$700 million over six years (approximately \$1 million per year to San Diego)
- Support of AB 2737 (Block) – State legislation to designate a lead entity in California to receive Federal funds and indemnify 211 operators
- Alignment with Health Strategy Agenda – County of San Diego Health & Human Services Agency long-range plan for effectively and efficiently improving service and health outcomes for San Diegans
- Partner Contracting – Opportunities to generate revenue through fee for service agreements with non-profit and corporate entities
- State and Federal Contracting – Opportunities to generate revenue through vendor contracts with State and Federal government, and potentially with municipal government and local special districts

Leadership in information and referral industry innovation will create value for 211 San Diego with marketable products that generate revenue and are sustainable and predictable, with emphasis on key areas:

- Data collection and analysis of trends, unmet needs, and gaps for community planning
- Innovation in technology solutions and product development
- Cutting edge training and quality assurance tools

This plan is intended to provide information for consideration by the 211 San Diego Board of Directors in the context of the organization's prioritization and allocation of resources for the coming year. The consulting team is available to answer questions and discuss recommendations with 211 San Diego leadership, and to continue to support the organization in the on-going efforts to secure long-term sustainable funding to ensure continued outstanding service to San Diego.

Introduction and Background

The 211 San Diego Business Plan for the Year ending June 30, 2010, identified a Development Plan focused on “Community Solutions” through partnerships with government entities, nNon-profits, foundations and corporations, as well as emergency preparedness and consulting services.

As part of those Community Solutions, the organization developed “Strategic Goals for Advocacy and Sustainable Funding”. Key elements are positioning 211 as the necessary first step for health and social service guidance, and as an essential resource for reliable local solutions to disaster response. 211 is well positioned to be the “go-to” expert for data collection and analysis regarding community trends because of the information and referral services it provides to over 180,000 client each calendar year. As part of the overall advocacy program, the Development Plan recognizes the need to:

- Strategize alternative funding streams
- Continue development of Community Solutions to core customer prospects
- Plan an annual fundraising event
- Work with existing partners to create/enhance relationships
- Enhance “Partner Outreach Educational Training” (POET) seminars to build grassroots support

Strategize Alternative Funding Streams

With the support of grant funding from the First 5 Commission, 211 San Diego undertook research and preparation of a Long-term Sustainability Plan (the Plan) to identify opportunities and support strategy for alternative funding streams.

The Clay Company (San Diego) and Carpi & Clay (Sacramento) were selected in November 2009 to work with 211 San Diego leadership on developing the Long Term Sustainability Plan. The Plan is focused on activities and priorities for policy change at the local/State/national levels that support the long-term viability of information and referral services through 211 in San Diego County.

The team identified and researched a range of short and long-term opportunities for stable, sustainable funding sources for 211 including government, fee for service, and value partnerships. Many of those options have been explored for their respective strengths/weaknesses, potential for success and risk, and range of timing and costs. This initial effort is intended to help 211 San Diego prioritize areas of focus for Fiscal Year 2011 and beyond, including a balance of short-term and much longer-term activities.

This information is provided for review and consideration by 211 San Diego leadership to begin prioritization and allocation of resources. The consulting team will continue to work with 211 San Diego through that process to answer questions and assist with on-going activities on legislative and funding opportunities already in progress.

Approach

The research process began in December 2009 with the mapping of existing and historical relationships between 211 San Diego and Federal, State and local government entities, individual elected officials and staff members, business and civic organizations and key leaders, the funding community, and other 211 service providers.

Information was gathered during more than three months of meetings with stakeholders, existing and potential 211 partners, consultants and key participants in the legislative processes. Through the process, potential funding sources, key players, “champions,” and potential opposition for various alternatives have been identified.

As the research process evolved and potential opportunities moved to the forefront, management and the consulting team have prioritized and actively engaged to pursue funding alternatives in a timely manner. The coordination of a long-term approach is vital. However, it is also critical that 211 vigorously pursue current opportunities as the long-term plan evolves. The dynamics change quickly and require active involvement by 211 executive leadership and consulting team on a daily basis in order to position the organization for effective response and proactive engagement.

A key component of the team’s effort has been and continues to be maintaining regular communication with 211 CA/United Way and 211 US for information gathering, feedback and strategic planning, and coordinated outreach efforts. The complex legislative processes at the State and Federal levels have highlighted the on-going need for regular dialogue with 211 colleagues.

Significant efforts also have been made to coordinate with 211 San Diego “champions” who have resources and relationships that will prove to be an immense benefit as 211 San Diego works towards sustainable funding at every opportunity. Key partners in the corporate community have provided valuable assistance with outreach, lobbying and strategic planning by dedicating high-level resources to push for 211 needs. Leveraging partner relationships for legislative goals will be an important tool for 211 San Diego to expand upon and increase effectiveness.

Contacts

Meetings and constant communication with Federal, State and local policy makers and stakeholders, as well as consultants and 211 leaders have been conducted since December 2009 to provide input for the Plan:

Federal Elected Officials, Departments, and Organizations

- Representative Brian Bilbray
- Senator Barbara Boxer
- Representative Susan Davis
- Representative Anna Eshoo
- Senator Dianne Feinstein
- Representative Bob Filner
- Representative Darrell Issa
- National Association of Counties
- Large Urban Counties Caucus
- QUALCOMM
- United States Department of Agriculture

State of California Elected Officials and staff, Departments, and Organizations

- Assemblyman Joel Anderson
- Assemblyman Marty Block
- Assemblyman Nathan Fletcher
- Assemblywoman Diane Harkey
- Assemblyman Kevin Jeffries
- Assemblywoman Mary Salas
- Minority Leader Martin Garrick
- Senator Dennis Hollingsworth
- Senator Mark Wyland
- Linda Barr, Principal Consultant, Senator Christine Kehoe
- Kealii Bright, Senior Consultant, Assembly Budget Committee
- Kim Craig, Legislative Director, Senator Denise Ducheny
- Bob Franzosa, Special Assistant to the Chair of Senate Appropriations
- Lucy Krohn, Chief of Staff, Assemblywoman Lori Saldana
- Andrew Zingale, Senior Consultant, Assemblywoman Lori Saldana
- Marianne O'Malley, Principal Fiscal & Policy Analyst, Legislative Analyst Office
- Staff of Assemblywoman Anna Caballero
- Staff of Senator Ellen Corbett
- Staff of Assemblyman Isadore Hall
- Staff of Assemblyman Pedro Nava

- Staff of Senator Roderick Wright
- Jerome Fitch Canelaria, Vice President and Counsel, Regulatory Affairs, CA Cable & Telecommunications Association (CCTA)
- Richelle Orlando, Senior Legislative Assistant, Governmental Affairs, CCTA
- Bernie Orozco, Director, Governmental Affairs, CCTA
- Edward Randolph, Director, Senior Policy Advisor, Office of Governmental Affairs, Public Utilities Commission
- Pete Manzo, United Ways of California
- Judy Darnell, United Ways of California
- California State Association of Counties

San Diego County Elected Officials, Departments, and Organizations

- Supervisor Greg Cox, District 1, County of San Diego
- Danny Melgoza, Policy Advisor, Supervisor Greg Cox
- Walt Ekard, Chief Administrative Officer, County of San Diego
- Nick Macchione, Director, Health & Human Services Agency, County of San Diego
- Rene Santiago, Deputy Director, Health & Human Services Agency, County of San Diego
- Barbara Jimenez, Executive Director, First 5 San Diego

Cities and other Counties

- Gary Wyatt, County Supervisor, Imperial County
- Ralph Cordova, Chief Executive Officer, Imperial County
- Various representatives, Imperial Irrigation District
- Chief Kevin Crawford, City of Carlsbad Fire Department
- Councilmember Carl DeMaio, District 5, City of San Diego
- Councilmember Donna Frye, District 6, City of San Diego
- Councilmember Todd Gloria, District 3, City of San Diego
- Councilmember Sherri Lightner, District 1, City of San Diego
- Thyme Curtis, Policy Advisor, Council District 2, City of San Diego
- Ana Molina Rodriguez, Chief of Staff, Council District 8, City of San Diego
- Don Mullen, Policy Advisor, Council District 7, City of San Diego
- Dr. Jim Dunford, Medical Director, City of San Diego
- San Diego City Council Public Safety & Neighborhood Services Committee

Local Leaders

- Karma Bass, Alliance Healthcare Foundation
- Jim Farley, Leichtag Family Foundation
- Jennifer Tierney, Gemini Group

- Jesse Knight, San Diego Gas & Electric
- Doug Sawyer, United Way of San Diego
- Mark Cafferty, San Diego Workforce Partnership

Federal Funding Strategies

Legislative Opportunities

In 2003, bi-partisan efforts to support nationwide 211 services began at the Federal level with the introduction of the Calling for 2-1-1 Act of 2003. While that initial effort did not result in the passage of legislation, the Alliance of Information and Referral Systems (AIRS) and United Ways have continued to push for subsequent attempts at the Federal level, and now are focused on passage of H.R. 211 (and companion S.211) in the Second Session of the 111th Congress. While Authorization of the pending legislation appears promising at this stage, the critical element will of course be Appropriation of approximately \$700 million for regional 211 services throughout the nation, based on required matching funds from State and other sources.

H.R. 211

Title: Calling for 2-1-1 Act of 2009

Sponsor: Rep. Anna Eshoo [CA-14] introduced January 6, 2009

Cosponsors: 220 as of March 26, 2010

Related Bills: [S. 211](#)

Latest Major Action: Referred to House Committee on Energy and Commerce (1/09)

Bill Summary

Calling for 2-1-1 Act of 2009 directs the Secretary of Health and Human Services to award a grant to each state to carry out a program for making available throughout that state the 2-1-1 telephone service for information and referral on human services. Requires a participating state to ensure that at least 50% of the resources of the program funded by the grant will be derived from other sources. Requires a state seeking a grant to carry out its activities through a lead entity to be known as a 2-1-1 Collaborative.

Requires grant amounts to be used solely to make available to a state 2-1-1 telephone service for community information and referral on human services to all citizens of that state with phone access, including telephone connections between families and individuals seeking services and the service providers.

Requires grant recipients to: (1) abide by the Key Standards for 2-1-1 Centers; and (2) collaborate with human service organizations to provide an exhaustive database of services with which to provide information or referral to individuals utilizing the 2-1-1 service.

H.R. 211 and S. 211 would provide a total \$700 million in matching funds to 211 providers nationwide over six years, requiring a State match to ensure that at least 50 percent of the

resources of the program would be funded by other sources. Estimates are that approximately \$1 million per year would be available to 211 San Diego.

As of March 25, 2010, there are 220 co-sponsors supporting H.R. 211 (218 needed to move the legislation through the House). In addition there are 56 of the 60 co-sponsors needed to support S.211, the companion bill. If broad bi-partisan support can be demonstrated, leadership may be able to suspend the rules and move H.R. 211 for a floor vote.

211 San Diego has had an active role and significant impact on bringing California legislators and others on board to support H.R. 211. While in Washington, D.C. in early March of 2010, 211 San Diego Chief Executive Officer John Ohanian and San Diego County Supervisor Greg Cox had the opportunity to meet with several key supporters of H.R. 211/S. 211, as well as speak directly with H.R. 211 author Anna Eshoo about the potential for action on the critical legislation in the upcoming months.

Additionally, during the 2010 National Association of Counties (NACo) Annual Meeting in March of 2010, the NACo Board of Directors voted to add support and advocacy for H.R. 211/S. 211 in their legislative agenda for the upcoming year. This action was a direct result of repeated lobbying and discussions by and on behalf of 211 San Diego.

211 San Diego is well positioned to influence and contribute to any action on H.R. 211/S. 211 in the upcoming months.

Recommendations and Timeline

- Active participation by 211 San Diego leadership in supporting 211 US efforts to advance H.R. 211, including working with local elected officials, funders and champions to gain additional Congressional co-sponsors (March – October 2010)
- Engage and coordinate consultation and activities with government relations specialists available to 211 San Diego through local corporate relationships (On-going)
- Maintain on-going communication with local staff of Federal delegation to continue to build awareness of 211 and positive impact on constituents (On-going)
- Attend 211 US events such as Capitol Hill Day, including executive leadership and local champions of 211 San Diego (On-going)

State Funding Strategies

Legislative Opportunities

211 San Diego leadership and Carpi & Clay have actively engaged with 211 California and United Way colleagues move forward with legislation at the State level. The team efforts began with research regarding the history of previous unsuccessful attempts at State legislation, including meetings with key Senate Appropriations staff to determine the options moving forward with Senate Bill 712 (Padilla) from last year. The general purpose of previous legislation was intended for the State to designate a lead agency to receive Federal funds should they become available, and indemnify 211 operators.

It was determined that it would be more effective to start with a new bill rather than trying to get SB 712 out of committee. United Way provided the initial draft language for the original bill SB 712 (Padilla) and draft language for a new bill. Efforts then began, in coordination with 211 CA and United Ways, to seek an author for a new bill. Working with Assemblymember Marty Block in San Diego and his staff in the Capitol, the team gained his interest and support, and he introduced Assembly Bill 2737 on February 19, the last day to introduce a bill for the current legislation session.

AB 2737

Author: Assemblymember Marty Block

Introduced: February 19, 2010

Latest Major Action: Referred to Assembly Utilities and Commerce Committee and Judiciary Committee (3/18/10)

Legislative Counsel's Digest

AB 2737, as introduced, Block. "211" telephone number system. Existing law requires a public safety agency, as defined, to maintain a "911" emergency telephone number, as specified, and sets forth the duties of the Division of Telecommunications of the Department of General Services, including the provision of management oversight of statewide telecommunications developments. Existing law authorizes a local public agency, as defined, to establish a nonemergency "311" telephone system, and authorizes the Division of Telecommunications to, among other things, aid local public agencies in the formulation of concepts, methods, and procedures that will improve the operation of the "311" systems and to increase cooperation among public agencies.

This bill would authorize the Public Utilities Commission to designate a lead entity for the implementation of a "211" abbreviated telephone dialing system throughout the state to provide information and referral services in accordance with applicable federal law. The bill would provide that a 211 information and referral services

provider and its employees, directors, officers, agents, or any public or non-profit agency that provides information to a "211" system are not liable to any person in a civil action for injuries or losses to persons or property, as a result of an act or omission of the provider or its employees, directors, officers, or agents, in connection with certain specified activities, unless the act or omission constitutes willful or wanton misconduct.

Through the First 5 Commission's support of the Long-term Sustainability Plan, the 211 San Diego team met with the San Diego legislative delegation and found that most of the legislators know of 211 and are quite impressed with the services and capabilities of 211. They all seem interested in the proposed legislation in order to draw down Federal dollars and appear willing to be helpful in the process.

Strategic discussions with 211 CA and United Ways are on-going and will continue throughout the process, which likely will continue through the conclusion of the legislative session in September.

Recommendations and Timeline (March through August 2010)

- Outreach to the San Diego delegation asking them to sign on as co-authors
- Outreach to California State Association of Counties (CSAC) for additional support
- Outreach to League of California Cities (LCC) for additional support
- Identification and outreach to potential opposition
- Consider amendments as necessary
- Conduct meetings with Assembly Committee staff and consultants who will analyze the bill
- Conduct meetings with Committee members to seek support
- Organize testimony at Committee hearing and Appropriations Committee

Additional State Opportunities

California Public Utilities Commission (PUC)

There is a history of discussion regarding 211 funding through telephone or other surcharges on customer bills statewide, similar to funding for 911 services. In fact, interviews and discussions with potential funders often generate interest in a PUC fee as a logical source to spread the cost and ensure statewide coverage for 211 services. Research indicates that there would be significant opposition to action to fund 211 through fees on cable/telephone customer bills, and also opposition to action that may be perceived to impact funding for 911 services.

Recommendation

- Continue discussions between 211 CA, 211 San Diego and PUC staff (March-June)

Emergency Response Initiative

Governor Arnold Schwarzenegger is once again considering an Emergency Response Initiative (ERI) fee on commercial and residential property insurance to fund emergency services in the California. Late last year, a previous version of the ERI was unsuccessful, but was intended to focus on State and local fire services and first responders. It was expected to raise nearly half a billion dollars per year through a surcharge of approximately \$50 on the average property insurance.

There will be significant competition for any funds generated through such an initiative, should it be successful, so it would require a concerted effort with 211 CA and United Ways to attempt to effectively seek inclusion in the ERI.

Recommendation

- Further discussion between 211 CA, 211 San Diego and research with Governor's office, Speaker's office and Budget staff (March-August)

Local Funding Strategies

First 5 Commission

211 San Diego's long time partnership with the First 5 Commission of San Diego has allowed the organization to develop programs that enhance the lives of thousands of children and families. 211 works with the First 5 Commission to provide information and referral for services to families with children age 0 to six and pregnant women.

All callers to 211 San Diego are screened for eligibility for First 5 related programs and support. That's approximately 180,000 callers a calendar year that, regardless of the callers' stated original purpose for contacting 211 San Diego, are given the initial screening questions for First 5 related services. As a result, it has been determined that since July of 2009, approximately 45,000 referrals were given to First 5 eligible callers.

Direct referrals of clients to First 5 funded programs for 2008-09 was approximately 16 percent of the annual call volume for 211.

As a contracted provider of the First 5 Commission, 211 San Diego provides valuable referral services to low income, uninsured mothers and families who don't know where to turn for services like childcare, dental health, and various other services that ensure that the region's thousands of children grown up happy, healthy, and ready to learn. 211 is also the only provider in San Diego that pre screens clients for additional services (food and utility assistance) and makes appropriate referrals to other First 5 providers, as well as the thousands of other health and social service agencies throughout the San Diego region.

Recommendation

- Continue to enhance value proposition for on-going and expanded service to First 5 clients and providers (On-going)

County of San Diego

The County of San Diego has been a principal funder of 211 San Diego since its inception as 211 in 2005, and before when it was INFO LINE of San Diego County, a program of the United Way.

In Fiscal Year 2010, the County of San Diego funded 211 through a General Fund allocation of approximately \$300,000. In addition to the General Fund, the County also provided \$75,000 through a grant from the Office of Emergency Services. The County Board of Supervisors also supported 211 through a Neighborhood Reinvestment Program (NRP, formerly known as Community Projects).

Given the state of the economy and the dire financial conditions of the State of California, General Fund dollars at the County of San Diego are at a premium this year and in the foreseeable future. It is for this reason that it is increasingly more important for 211 to demonstrate its worth and value to the County of San Diego for every day services like access to child care and health and social services, but also in times of disaster. Clearly, the 2007 fires showed how important 211's role in the County's disaster response truly was to the region's many individuals and families.

211 San Diego's leadership and staff continue to stay in constant communication with leadership at the County of San Diego. CEO John Ohanian has presented updates to aides in each of the five Board of Supervisor's offices, which has resulted in meaningful data sharing as well as greater awareness at the elected level of the value of 211. In addition, 211 San Diego has engaged with leadership at the Health and Human Services Agency (HHS) through direct communication about 211 and its growing role and relationship with the County of San Diego.

The organization's management team has also been actively engaged in HHS Director Nick Macchione's Health Strategy Agenda by providing constructive feedback and support for the Agenda. In order for 211 to increase its role with the County of San Diego, it must find its place in the Health Strategy Agenda.

On March 23, 2010, the County Board of Supervisors voted to reduce the Neighborhood Reinvest Program (NRP) by \$5 million. That \$5 million went directly back into the General Fund to fill much needed gaps in critical health and social service programs provided by the County of San Diego. It will be up to the Chief Administrative Officer and his executive team to decide how to allocate that money before the Board of Supervisors votes on the budget in early June.

While 211 San Diego has been the recipient of several NRP allocations in the past, there is less of an opportunity to receive those funds in the future, there may be potential to receive a substantially larger and less restrictive allocation from that \$5 million that will be going back into the General Fund.

Between late March and early May of 2010, 211 staff will be actively engaged with HHSa leadership and the Board of Supervisors as they determine how to allocate that \$5 million. This is an opportunity for 211 to show its strength and value to the County in trying to access those funds.

By staying in constant communication with the County of San Diego over the next several months, the goal will be to prove 211's worth and value to the County, and continue to work with leadership to identify new funding strategies that aren't reliant on General Fund allocations or one time contracts for public health or public safety emergencies.

During these economic times, the organizations that work with the County to provide access and services in the most efficient and cost effective way will prove to be the most valued partners. The County has a history of being extremely innovative when they have less money than needed to provide the programs and services they are mandated to provide. If 211 can be a resource and not just a contractor through this process of necessary innovation at the County, it will emerge as solid partner that is worthy of long term sustained funding from the County of San Diego.

Recommendations and Timeline

- Continue meetings with HHSa leadership for discussion of alignment with Health Strategy Agenda (March – May)
- Engage with County Chief Administrative Officer and Board of Supervisors regarding short term General Fund opportunities (March – May)

City of San Diego - General Fund

The City of San Diego, which includes approximately one third of the County population, has not funded 211 San Diego in any manner to date. While other incorporated cities in the region have dedicated General Fund or other resources to support the organization, the City of San Diego's anticipated budget shortfalls are unlikely to allow General Fund allocations to 211 San Diego at least for at least the next Fiscal Year 2011.

Recommendation and Timeline

- Outreach to Independent Budget Analyst to research potential savings to City with utilization of 211 San Diego resources (Summer 2010)
- Continue research and outreach with public safety representatives including San Diego Police Department, San Diego Fire Rescue Department and emergency medical services providers regarding disaster and regular operations opportunities for coordination and efficiency. Consider potential pilot opportunities with public safety agencies to demonstrate partnership value. (On-going)

Community Development Block Grants

Approximately 50 percent of calls to 211 San Diego in the past year were generated from individuals within the City of San Diego, and the City is home to hundreds of providers to whom callers are referred. The City's Community Development Block Grant (CDBG) Public Services program for Fiscal Year 2011 provided an opportunity for 211 San Diego to serve

citizens with its Healthcare Navigation Program, addressing the City's CDBG program goal of creating a better living environment for person with special needs.

The 211 San Diego team actively engaged in the application process, including meeting with City Council members and staff to gain support for the application. As of March 4, 2010, the CDBG Program staff had completed its evaluation of applications and recommended funding of 211 San Diego's application for \$100,000. Five members of the City Council included 211 San Diego as a priority for funding, and full City Council action on the recommendation is expected in April 2010.

Recommendation and Timeline

- Provide testimony and support for funding request during public hearing process
- Continue communication with City of San Diego Housing Commission staff to explore additional opportunities

Cities in San Diego County

San Diego County includes 18 incorporated cities, of which nine participate in funding 211 San Diego for a total contribution of nearly \$60,000. Cities participating in Fiscal Year 2009-2010 are:

- Coronado
- Del Mar
- Escondido
- Lemon Grove
- National City
- Poway
- Santee
- Solana Beach
- Vista

The respective cities provide funding at varying levels and from a variety of budget categories. In addition to regular information and referral services, cities utilize 211 services for regional and local disaster support, which may include events such as localized "boil water" orders, emergency road closures, and other community needs.

Plans are also under way to include participation by the Carlsbad Charitable Foundation to develop a 211 relationship with the City of Carlsbad. A pilot program is being explored, which may serve as a model to increase participation by additional cities throughout the County. Bringing together public, private, charitable and non-profit resources will allow 211 San Diego to expand and enhance service to the community and enhance the efficiency of local government in difficult financial circumstances when residents are need.

Recommendations

- Develop and implement Carlsbad pilot program with charitable and non-profit partners to create replicable service and funding model for other local cities (On-going)
- Continue outreach to all local cities during FY 2011 budget preparation cycle with \$0.20 per capita request (March – June 2010)

Imperial County

211 San Diego leadership, including County Supervisor Greg Cox, has worked with Imperial County representatives for nearly two years to explore opportunities to serve the significant needs of that community through enhancing existing operations in San Diego.

Progress has been made in identifying start-up funding to incorporate the necessary database components into 211 San Diego resources and build the network of resources to provide quality information and referral service to Imperial County callers. First year and start up funding is being sought from a corporate partner, the County of Imperial, and the Imperial Irrigation District. Sustainable long-term funding for serving the additional region will present challenges to 211 San Diego. However, it is the hope that 211 San Diego will prove to be an effective and low cost option for Imperial County as they prioritize their funding in future budget years.

Recommendations and Timeline

- Identify fee for service and contracting opportunities unique to Imperial County to cover 211 San Diego incremental costs for service area

Local Ballot Initiative

A statewide ballot initiative to fund 211 throughout California would require the commitment and leadership of 211 CA, United Way and others to begin any discussion of such a monumental and costly effort. Rough estimates are that the cost to run a statewide ballot initiative is approximately \$30 million for an effort with no organized opposition. If such an interest exists among statewide leaders, then consultation with experienced professional campaign consultants would be a first step to exploring such an alternative.

A countywide ballot initiative to fund 211 San Diego only would be viewed as a special tax, requiring two-thirds voter approval in the County of San Diego. Historically, tax measures are more likely to be successful during General Elections due to the higher turnout, with November 2012 the next possible date.

In general, the steps to qualify an initiative for a County ballot are:

- Initiative proponent would be required to circulate an initiative petition for signature, which must be signed by at least 10 percent of the entire vote cast in the County at the last gubernatorial election in order to qualify the initiative for a regular election (20 percent required for a special election).
- If qualified for the ballot after examination of petition signatures, then the Board of Supervisors may adopt the measure, or, alternatively, place the measure on the ballot

- It can take up to nine months from the date a proposed initiative is filed until the Board of Supervisors issues a statement that an election will be held

With more than 1 million registered voters in the County, cost to gather signatures for an initiative petition is estimated at approximately \$300,000, and another \$1 million may be necessary to run a campaign. The total revenue to be generated from a special tax or fee does not necessarily impact the cost of running a successful campaign.

The first step toward any action on consideration of a ballot initiative is conducting public opinion research. First phase research is required to broadly determine the base level of issue awareness, parameters by which such an initiative may be successful, the potential threats and weaknesses of the arguments in favor, and key supporters and opponents who may impact voters. From the initial research, professional campaign consultants will be able to offer analysis and advice regarding the potential of the initiative and estimates for the cost of a successful campaign.

As a non-profit organization, 211 San Diego must conform to legal restrictions on participation in campaign activities. A separate entity, called a Ballot Committee, would have to be formed and registered consistent with all Federal, State and local requirements for campaign activities.

Recommendations and Timeline

- Determine level of funding sought through initiative, options for types of fees (sales or use tax, parcel tax, utility user fee, etc.) and vehicles available (Fall 2010)
- Conduct public opinion research and analyze data to determine next steps and budgets (mid-2011)

Partnership Funding Strategies

211 San Diego has successfully contracted with a variety of partners, including utility programs, workforce programs, and other non-profit organizations to build a solid base of diversified fee for service agreements.

In addition to a variety of fee for service agreements, 211, with the help of local technology leaders like Qualcomm Incorporated, has created technology solutions that will be long-term sustainable funding sources for 211 San Diego.

Innovations like *ReliefPoint*, a web-based disaster database, have already proved to be an ideal example of product development that serves a tremendous need and is consistent with 211 San Diego's core services and competencies. As the only 211 in the nation with the *Relief Point* program, 211 San Diego is an invaluable partner and resource to 211s throughout the country during times of disaster. This unique program also has the potential to help 211 better connect with its clients by eventually giving them timely information and accurate point to point directions to places like community clinics and H1N1 vaccination sites. 211 San Diego is well positioned to create a sustainable funding source through programs like *ReliefPoint* by selling the technology and training other 211s on its uses.

A valuable product of 211 San Diego's work in the community is the information collected from callers, agencies and providers in the San Diego. The *2009 Client Needs Analysis*, conducted by SANDAG, yields useful data on the trends, needs, gaps and opportunities facing the region. This data and analysis has important implications for elected decision makers, community leaders and service providers. A significant marketing opportunity for 211 San Diego may exist for trend and forecast data.

Recommendations and Timeline

- Engage professional services as necessary to utilize and market Needs Analysis and explore additional data/information product opportunities (June – December 2010)

Contracting Opportunities and Grants

211 San Diego is actively pursuing contracting opportunities with Federal, State and local agencies that offer programs within existing core services that may be provided at a lower cost through fee for service contracts with 211.

In addition, 211 can provide options to expand services for those agencies within the San Diego region; helping them reach their outcome numbers and deliverables. Short term (less than three years) contracting opportunities, fundraising and other sources ultimately may account for one-third to one-quarter of 211 San Diego's annual budget as a long-term sustainable (three year commitment and beyond) funding becomes established.

Contracting opportunities also represent the opportunity for collaboration with other 211 entities throughout the California and the United States, and must be considered in the context of existing working relationships, effective utilization of shared resources, and long-term efforts to expand and enhance 211 coverage.

The following agencies are identified as priorities for further investigation and research by 211 staff:

Federal Government

- Department of Agriculture (food programs)
- Department of Education
- Department of Health & Human Services
- Department of Homeland Security – Urban Areas Security Initiative (UASI) grants
- Federal Communications Commission
- Housing & Urban Development
- Veteran's Administration

State of California

- Emergency Management Agency (Cal EMA)
- Health & Human Services Agency
- Veteran's Affairs

County of San Diego

Health & Human Services Agency – Public Health
Public Safety Group
Office of Emergency Services

Special Districts

County of San Diego Board of Education
County Water Authority and Member Agencies

**211 San Diego Sustainable Funding Plan
Implementation Timeline**

Attachment 1

Funding Opportunity	Key Objectives	Tasks	Start Date	Estimated Completion Date
Federal	HR 211/S211	Active work to gain co-sponsors	3/1/2010	10/31/2010
		Work with corporate partners to gain support for HR 211	3/1/2010	Ongoing
		Communication with SD Federal delegation in DC and San Diego	3/1/2010	Ongoing
		Coordinate with 211 US	3/1/2010	Ongoing
		Communication with NACo	3/1/2010	Ongoing
State	PUC Administrative Process	Work with 211 CA to coordinate efforts	3/1/2010	Ongoing
		Consult with PUC staff	3/1/2010	6/30/2010
		Opposition research/communication	3/1/2010	Ongoing
		Communication with CSAC	5/1/2010	Ongoing
	State Legislation	Seek support for AB 2737	HOLD	HOLD
		Meet with SD delegation officials	HOLD	HOLD
	Governor's Initiative	Discussion with 211 CA	3/1/2010	8/31/2010
		Research with Governor's office	3/1/2010	8/31/2010
Research with Speaker's office, Budget staff		3/1/2010	8/31/2010	
Identify local/statewide support and opposition		3/1/2010	Ongoing	
Local	First 5 Commission	Enhance value and expand service to clients and providers	3/1/2010	Ongoing
	County of San Diego	Align with Health Strategy Agenda	3/1/2010	8/31/2010
		General Fund research/requests	3/1/2010	5/31/2010
	City of San Diego	Research potential City budget savings	7/1/2010	8/31/2010
		Research/outreach to OES/Police/Fire re: disaster	5/1/2010	8/31/2010
		CDBG application process	1/1/2010	6/30/2010
		Research Housing Commission opportunities	5/1/2010	6/30/2010
	San Diego area cities	Secure funding renewals with nine cities	3/1/2010	6/30/2010
		Develop Carlsbad pilot program	3/1/2010	12/31/2010
		Outreach/request to remaining cities	3/1/2010	6/30/2010
	Local ballot initiative	Preliminary research	HOLD	HOLD
Imperial County	Establish service capability	3/1/2010	12/31/2011	
	Build relationships with elected officials, funders, stakeholders	3/1/2010	Ongoing	
	Identify funding sources and partnerships	3/1/2010	Ongoing	
Partnership	Data/Analysis	Engage professional services to identify and develop market for data and analysis	6/1/2010	12/31/2010
	Technology/Product Development	Continue work with partners to create innovative IT solutions for market	Ongoing	Ongoing
	Training/Quality Assurance	Continue to develop innovative solutions and identify markets	Ongoing	Ongoing
Contracting/G rant	Obtain contracts	Identify and pursue Federal opportunities: USDA, Dept of education, H&HS, DHS, FCC, HUD, VA	Ongoing	Ongoing
		Identify and pursue State opportunities: CalEMA, HHSA, VA	Ongoing	Ongoing
		Identify and pursue County of San Diego opportunities: HHSA, Public Health, Public Safety, OES	Ongoing	Ongoing
		Identify and pursue Special District opportunities: Board of Education, CWA	Ongoing	Ongoing