



**A RESOURCE GUIDE CREATED
BY UCP AFFILIATES**

Acknowledgements

Affiliate Services Committee:

Woody Connette, UCP Board of Trustees (*Chair*)
Dr. Joe Aniello, President & CEO, UCP of South Florida
Ian Ridlon, UCP Board of Trustees
Mark Shaffer, Executive Director, UCP of San Luis Obispo
Ouida Spencer, Board Member, UCP of South Carolina and UCP of Georgia
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Janice Bushfield, Executive Director, Cerebral Palsy Association in Alberta
Ray Call, CEO, UCP of San Joaquin, Calaveras & Amador Counties
Margaret Farman, Executive Director, UCP of the North Bay
Keith Kearney, Associate Executive Director, UCP of Hudson County
Trish Otter, President & CEO, UCP of Greater Cleveland

Website Hosting and Support:

Alleghenies UCP
Johnstown, PA

From the President & CEO

Dear Colleagues:

UCP is extremely pleased to provide you with "Sharing Success: A Resource Guide Created by UCP Affiliates."

The Program Advancement and Resource Development Committees, consisting of fifteen affiliate leaders, collaborated on this guide to provide you with successful best practices in Program Advancement, Fundraising and Social Enterprise that can easily be implemented.

The initiative came as a result of leadership by the Professional Council, the Affiliate Services Committee and the Board of Trustees of UCP. We were challenged to capture, in some meaningful way, the rich entrepreneurship and innovative practices that has become synonymous with UCP affiliates.

Special thanks must go to Glenn Harger, Chair of the Program Advancement Committee, Marie Polinsky, Chair of the Resource Development Committee, Diane Wilush, Chair of the Public Policy Committee, and all of our colleagues that participated in this process.

The committee members were absolutely engaged and committed to the project and were determined to assure that all affiliates were contacted personally. The committees were particularly looking for submissions that were replicable and scalable. The committees also identified the need for white papers on certain topics. Provided here are six white papers and 60 templates.

I am very proud of the work of the committees and staff that supported the initiative. All of us gained an increased appreciation for the depth and strength of the UCP affiliate network.

All the best,

A handwritten signature in black ink that reads "Stephen Bennett". The signature is written in a cursive, flowing style.

Stephen Bennett
President & CEO
United Cerebral Palsy

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Program Advancement

Transportation **by Mark Shaffer, Executive Director, UCP of San Luis** **Obispo County**

Is Transportation a Viable Business for your Affiliate?

Transportation can be a profitable business for a non-profit organization, but each affiliate needs to look at their current transportation assets and research the funding opportunities in their region. When you have the vehicles and transportation infrastructure set up, you can diversify who you provide transportation to in your area to increase your income. You do not want to just provide one type of transportation service, but rather offer your services to people with disabilities, seniors, social service agencies and even the general public.

The first step is to look at your current transportation assets. Do you have vehicles that you can use? Do you already have transportation services that you are providing? If you do not have any transportation assets, it does not mean that you cannot develop profitable transportation services. Once you have listed your assets, you are ready to begin your market research.

The first step is to make an appointment with the transportation planning organization for your county. For us, they are called the Council of Governments. This group is usually responsible for funding the construction of roads and public transportation. It is best to make an appointment and meet them in person. Explain to them that your affiliate is looking at the effectiveness of specialized transportation for people with disabilities and seniors. They will explain the current programs and who is providing them. Some states have dedicated funding to an agency that improves social service transportation. Take lots of notes and ask them if there is a website that lists all these services. Ask them if there are any funding sources available to provide specialized services.

The next step is to look at who is transporting people with disabilities to their day programs. Is the service provided by one company? Is that company a non-profit or a for-profit company? Make an appointment with the agency that oversees services for people with disabilities and ask them if they are happy with the current providers. They may be looking for a new provider that can provide the service for less and your affiliate's experience with working with people with disabilities is a plus. If they are interested in

Transportation

looking at a new provider, you need to find out how many routes they need covered.

The next funding source for transportation is through your state Medicaid system. In California, we have Medi-Cal and CenCal, which are state-funded services that provide funding for individuals who cannot use public transportation. They also provide funding for people who are receiving dialysis treatment three times a week. Dialysis patients are often too weak to drive themselves after treatment, so they need specialized transportation. Do some research and find out who is providing these services.

Are the people with developmental disabilities getting adequate transportation in the evenings and weekends? If the people you serve do not have access to the community during these periods, you can go through the annual Unmet Transportation Hearing Process to seek funding for your own transportation service for this group. The transportation planning agency is probably responsible for identifying unmet transportation needs and can explain the process to seek funding to meet these needs.

You also need to talk to other social service agencies about their transportation needs. Do they have any unmet transportation needs that your agency could meet? Maybe they would rather pay your agency than provide the service themselves. Make a list of as many social services as you find and call them to assess their transportation status.

By gathering all this information, your affiliate should be able to determine if there is a need in your region for your agency to provide transportation. If you feel that public transportation and specialized transportation is already meeting the needs of the people in your region, then do not attempt to develop a transportation service for your affiliate. If your research shows a strong need for an agency to develop transportation services, then you are ready for the next step in the process.

If you have decided to continue the development of your potential transportation services, then you need to develop a plan. This plan will help you determine if your transportation service has the potential to be successful. You want to list on the income side the revenues that you are currently receiving for transportation and then all the possible revenue sources based on the unmet needs you discovered during your market

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research. List how many hours of service you will provide a month and the rate you will receive per hour. You may need to estimate the rate for the services that are not established.

Next you will need to estimate the costs related to each potential service. Some costs are variable, such as driver wages, maintenance, and fuel. They vary based on the number of hours of service. Most of your costs are fixed to pay for administration and office expenses for the service. The fixed costs are shared by each service. The variable costs go up as the number of hours of service increase. It is important to separate the variable costs from the mixed costs. You should end up with a spreadsheet with the income and expense for each existing and proposed service. You can adjust the distribution of the fixed costs between services as you add new services.

This planning tool will show you which services need to be in place for your agency to make a profit. You may have four potential services but are able to make money with the first three services. If you add the fourth service, you can assign some of the fixed costs to that new service, which lowers the cost for the other three services. This planning tool will be a good predictor on whether you should move forward into the transportation business.

The next step is to plan the number and type of vehicles your agency will need to provide these potential services. You will need to look at the hours of operation for each service. For example, your contract to take riders with disabilities to their day programs might need three buses with operating hours of 6:30 am until 9:00 am and then 2:00 pm until 4:30 pm. You want to be able to fill in the idle time between 9:00 am and 2:00 pm with other transportation, so your drivers can get 40 hours a week driving. You will use this vehicle plan to determine how many vehicles you need for the future. Non-profit agencies can acquire vehicles through the Department of Transportation's Section 5310 Grant Program. With this grant, your agency only pays about 12% of the cost of a new bus. You will want to research this grant program, because applications are only accepted one time during the year. By now, you are feeling pretty comfortable that there is a need for services and your income will cover your expenses.

Now you will want to establish a focus group to look at how your agency can provide more social service transportation. You will want to include social

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service agency representatives, transportation planners and people who use the services. The goal of the focus group is to support your agency during the development of your transportation services. The members can help you market your service and find other groups who would like to use your service.

By following this process, you can perform an assessment of the need for transportation in any region in your affiliate service area. Let me share the evolution of our affiliate's participation in transportation. We started a small transportation service for people with developmental disabilities in the evenings and weekends in 1987. We worked with the San Luis Obispo Council of Governments, who declared the service was not being provided, so they funded the service. The Council of Governments established UCP as the Consolidated Transportation Service Agency (CTSA) to allow us to receive funding.

In 1993, UCP expanded its transportation services to include all social services agencies. We consolidated with a group home provider and a day program and began Ride-On Transportation under United Cerebral Palsy. The consolidation brought 16 vehicles together to provide four contracts. The local Rideshare organization began working with Ride-On in 1994, and we began Airport Shuttles and Group Shuttles for the general public. Since that time Ride-On has grown to 90 buses and vans with 55 drivers. We provide rides for seniors, people with disabilities, Veterans, social service agencies and the general public. We provide vanpool services for agricultural workers and the general public. Last year, we provided more than 329,000 rides in San Luis Obispo County. Our budget for our transportation services is about \$4 million a year.

Building a transportation system can be challenging, but once you have established a system you will have many people and groups seeking rides. You have to make sure you charge enough to cover your costs and seek subsidy funding to provide low fare rides to special groups. I am available to assist your affiliate in this process and to develop a transportation system. I can be reached at (805) 541-8751 or at shafmt@aol.com.

Partnership with NISH

by Brenda Yarnell, President & CEO, UCP of Land of Lincoln

Building a Business Enterprise for Affiliates: Partnership with NISH

NISH is a national nonprofit agency whose mission is to create employment opportunities for people with significant disabilities by securing federal contracts through the AbilityOne Program for its network of community-based, nonprofit agencies. This effort has allowed people who are blind or who have other significant disabilities to acquire job skills and training, receive competitive wages and benefits, and gain greater independence and quality of life. Through the AbilityOne Program, individuals can apply their AbilityOne skills into other public and private sector jobs.

While UCP Land of Lincoln has offered Supported Employment Services and Job Training since 1985, our organization created and developed a Business Enterprise (BE) model with NISH and federal government contracts as its base. The BE concept evolved from our strategic planning process, identifying job creation for people with disabilities, and generating non-state revenue to support the program operations.

Land of Lincoln's partnership with NISH began in November 2005 with a janitorial contract at the local 183 Air Guard Base in Springfield. The contract for \$60,000 employed 6 people with disabilities at commensurate wages with benefits. As we enter the FY 12 budget cycle, Land of Lincoln has nine federal contracts through NISH. There are 42 people employed as Client/Workers, making an average wage of \$ 10.06 per hour plus benefits.

The opportunity to partner with NISH in a contract generally falls into two categories; **services** and **products**. Service contracts include opportunities such as janitorial, housekeeping, grounds maintenance, call centers or document destruction. Production contracts include work such as sewing uniforms, ammunition bags, wooden pallets, furniture, pen assembly, and repackaging goods such as dry milk.

Contracts originate from three primary sources: 1.) a federal agency has work they need delivered and they contact NISH to create a new or expand an existing relationship, 2) NISH Business Development Staff work with a federal customer to identify work that could be performed by a person with a disability, 3.) the local Community Rehabilitation Program (CRP) identifies an opportunity for a federal contract through a contact or relationship in their community with someone in a federal agency, and initiates a discussion between the agency representative and NISH.

Partnership with NISH

NISH is headquartered in Vienna, Virginia and has six regional offices:

- East Region: Vienna, Virginia
- South Region: Atlanta, Georgia
- North Central, Chicago, Illinois
- South Central, Arlington, Texas
- West Region, San Francisco, California
- Northwest, Seattle, Washington

Each of the six regions, along with the National Council for Work Centers (NCWC), hosts a regional meeting annually for the CRP's in their area. It is strongly suggested that affiliates attend their regional meeting, which is a great place to meet NISH regional staff and to network with other CRP's in your region. Opportunities through the AbilityOne program often develop through building relationships with the NISH staff and government officials.

Organizations interested in developing a partnership with NISH can learn more about the organization from its website: www.nish.org. On the NISH website, there is the ability to register as an affiliate CRP. Part of the process of registering involves indicating what type of product or service in which you have expertise; or that you have the resources and motivation to acquire the expertise necessary to successfully partner with NISH and the federal government. It is critical to indicate a line of work you can offer, your existing resources (human and financial), capacity, as well as your experience, since this is how NISH staff understands the capacity of CRP's when they develop jobs.

Partnership with NISH has several advantages, including a wealth of training opportunities covering industry specific topics as well as courses that enhance leadership and management expertise. NISH offers training and technical assistance through a variety of venues: webinars, teleconferences, regional training and a content-laden annual training conference with 1,200 attendees from across the U.S. These trainings are free once your organization becomes affiliated with NISH.

NISH has adopted a very aggressive goal of doubling jobs for people with severe disabilities. This is an opportunity for affiliates to partner with NISH and to meet UCP's mission of helping people have a meaningful job.

Contact Brenda Yarnell at byarnell@ucpll.org

Assistive Technology

by Jeff Cooper, President & CEO, UCP of Central Pennsylvania

If you are interested in providing Assistive Technology (AT) Services, contact your state's AT Project. The Association of Assistive Technology Programs (Google) provides contact information for each state's Lead Agency.

Your state's Lead Agency will be able to tell you how to become a provider of AT services. Services you may consider providing include: AT Resource Center, Device Demonstration, Reused/Exchanged Equipment, and Telecommunications Device Distribution.

Your basic cost will be for staff. You may want to employ an AT certified professional, certified by the Rehabilitation Engineering and Assistive Technology Society of North America (RESNA). You will need additional space if you set up a demonstration lab or have a reuse/exchange program.

Contact Jackie Wardle jwardle@ucpcentralpa.org 717-737-3477

In-home Waiver Services **UCP/CLASS (Pittsburgh)**

CEO/Executive Director: Al Condeluci

Person Completing Form: Jeff Parker

Email: JParker@UCPCLASS.org

Phone: (412) 683-7100

Attendant Care Waiver

This waiver allows persons with physical disabilities, ages 18-59, who meet the nursing facility level of care to remain living at home and in the community. Services offered under this waiver include: service coordination, attendant care services, and emergency response.

Independence Waiver under the Community Service Program for People with Physical Disabilities (CSPPPD)

This waiver allows adults, ages 18 and older, with physical disabilities who are not ventilator dependent, require nursing facility level of care, and for whom the primary diagnosis is not mental health or intellectual disability to live in the community. Services offered under this waiver include: daily living, community integration, environmental modifications, transportation and respite.

Omnibus Budget Reconciliation Act Waiver (OBRA) under the Community Service Program for People with Physical Disabilities (CSPPPD)

This waiver allows individuals with developmental (onset prior to age 22) physical disabilities who require an "Intermediate Care Facility for individuals with Other Related Conditions" (ICF/ORC) level of care and for whom the primary diagnosis is not mental health or intellectual disability to live in the community. Services offered under this waiver include: daily living, community integration, environmental modifications, transportation and respite.

In-home Waiver Services **UCP/CLASS (Pittsburgh)**

Commcare Waiver

This waiver allows persons with traumatic brain injuries (TBI), ages 21 and older, who meet the specialized rehabilitation services level of care to remain living at home and in the community. Services available may include: Adult Day Services, Behavioral Specialist Consultant, Chore Services, Coaching/Cueing, Cognitive Therapy, Community Integration, Community Transition Services, Counseling (Consumer and/or Family), Educational Services, Environmental Adaptations, Extended State Plan Services, Habilitation and Support, Night Supervision, Non-Medical Transportation, Personal Care Services, Personal Emergency Response Systems (PERS), Prevocational Services, Respite Care, Service Coordination, Specialized Medical Equipment/Supplies and Assistive Technology, Structured Day Program, and Supported Employment.

In-home Waiver Services UCP/CLASS (Pittsburgh)

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
In-home waivers - attendant care, COMCARE, CSPPPD	Ages 18 through 59	Ability for persons with disabilities to participate and reside in the community	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
100% by the state for waivers	100% by the state for waivers	This is going to depend on the initial size of the program. You have to assume that, at the very least, you have a service coordinator at a minimum of \$25,000 annually plus benefits, personal care attendants working at \$9 to \$14 an hour and administrative overhead. Again, the breakeven point will be when you are serving the number of consumers that the state's reimbursement for services matches your administrative and personnel costs.	The service coordinators are required to have a psychosocial degree. The attendants are required to have certain mandatory trainings each year, such as infectious disease control. It's not required but strongly recommended that attendants' previous experiences include working with persons with disabilities.

Youth Employment Services (YES)

UCP of East Central Florida

CEO/Executive Director: Craig Byrd

Person Completing Form: Craig Byrd

Email: cbyrd@ucpecf.org

Phone: (386) 274-6474

The focus of the Youth Employment Services program is to enhance employability skills and secure employment opportunities for high school youth with learning disabilities. This program serves as an intervention to give 100 students with learning disabilities, who are at risk of not completing school, a functional alternative; one that enhances the development of employability skills, provides youth development and mentoring opportunities and results in competitive employment. This program will provide enrolled students with intense training in the areas of pre-employment skills, exposure to work experience through community based instruction, individualized job development, job placement and job coaching.

Youth Employment Services (YES) UCP of East Central Florida

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
Youth Employment Services	In-school youth (ages 16 - 24) with disabilities with an IQ of 70 or above.	1. Prevention of drop out upon graduation, 2. Enrollment in post-secondary educational institution, 3. Enlistment in the military, or 4. Acquisition of employment.	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
Workforce Development Board (WDB)	WDB - 100%	\$20,000 for staff costs and supplies before reimbursements begin.	Job development and job coaching.

Autism Center for Excellence **UCP of Sacramento and Northern California**

CEO/Executive Director: Douglas Bergman

Person Completing Form: Tanya Hartle

Email: thartle@ucpsacto.org

Phone: (916) 283-8302

The Autism Center for Excellence (A.C.E.) is an interdisciplinary and multi-agency collaboration that serves to systematically address the unique needs of children ages 8-12 with a diagnosis under Autism Spectrum Disorder (ASD) by providing a structured, daily after-school socialization program designed to increase their ability to participate successfully in inclusive community-based programs of their own choice. Anticipated outcomes include: increased social skills, physical functioning (gross motor, perceptual-motor, sensory motor skills), increased interpersonal communication skills, reduction in non-adaptive or inappropriate behaviors such as motor or vocal stereotypes, increased appropriate behavior in the community, and enhanced friendships and social support networks.

Program Advancement	
Name of Program	
Autism Center for Excellence (ACE)	
Programmatic Outcomes	
<p>The major anticipated outcomes for ACE program are: 1) To provide daily, quality instruction for each participant to increase their social communication/language skills as they relate to interpersonal socialization, group social skills, adaptive behavior and social motor skills. Providing daily, quality instruction to ameliorate deficits in language, behavior and motor skills, the participants will gain increased overall functional ability so that they can be productive, active citizens in their communities at large. 2) To create a physically and emotionally safe after-school environment for children ages 8-12 who have a diagnosis of ASD and are Regional Center eligible. By creating a physically and emotionally safe socialization program, children and their families will have an appropriate after-school option similar to their peers without disabilities. Far too often individuals with ASD are left out of after school programs for youth due to lack of appropriately trained staff and existing program structures. Individuals with autism require specialized programs to</p>	

Autism Center for Excellence

UCP of Sacramento and Northern California

address their characteristics and needs. Program design must include elements of: language/pragmatic communication skills, age and developmentally appropriate social behaviors, and overall motor skill development. Any program without specialized instruction and qualified trained staff sets up children with ASD to fail. Their unique needs and behavioral characteristics must be addressed through purposeful and systematic planning. ACE is purposefully designed and structured to systematically reduce those barriers. 3) To increase self-determination in each participant related to inclusive community-based recreation and social activities. Increasing self-determination will ensure that the participants will maximize their participation in inclusive community-based recreation and leisure activities once they exit the program and throughout their lives. 4) To establish partnerships with community-based recreational or social organizations. Establishing partnerships with community-based agencies serves to bridge the lives of individuals with ASD and their families to their home communities. Further, by creating these partnerships, these agencies will have a greater understanding and sensitivity toward the unique needs of individuals with ASD. This increased awareness will benefit all individuals with developmental disabilities for years to come as the doors to community have been opened a bit wider. 5) To serve as a model program to be replicated throughout the region. Serving as a model program to be replicated in other regions will be one of the most significant accomplishments of the Program as it has the potential to positively impact hundreds of individuals with ASD in needed areas. 6) Through participation in daily program activities that include group socialization, interpersonal socialization, interpersonal communication, large and small group social motor activities and sensory motor activities, participants will increase: social skills; physical functioning (gross motor, fine motor and perceptual-motor skills, balance, agility and over all athletic skill); increased interpersonal communication skills; reducing non-adaptive or inappropriate behaviors such as motor or vocal stereotypes; increasing appropriate behavior in the community; and enhancing friendships and social support networks 7) Through acquisition of numerous skills through the small and large-group activities, participants will apply socialization skills learned in the program by participating in inclusive community-based recreational or social activities of their choice.

Autism Center for Excellence
UCP of Sacramento and Northern California

Target Population
Children, ages 8 to 12, who have a diagnosis of ASD
Start-Up Funding Needed
Start up funds for ACE were \$125,000
Funding Mechanism
State funding (program fees), In-Kind Support, Grants & Foundations
Funding Sources (include % break out)
Program fees (state funded - 85%, In-Kind Support - 6%, Grants & Foundations - 10%)
Specialized Expertise Required
ACE employs consultants in the field of Applied Behavioral Analysis, Speech & Language, Physical and/or Occupational Therapy, and adaptive physical education.

CARE (LEAP) Program

UCP of West Alabama

CEO/Executive Director: LaMonica Herron-McCoy

Person Completing Form: LaMonica Herron-McCoy

Email: executivedirector@ucpwa.org

Phone: (205) 345-3031

The CARE (LEAP) Program is an inclusive “out of school” and extended day program designed to support the families of Tuscaloosa County in their need for a safe and therapeutic environment for all individuals.

Purpose:

Supporting inclusion in our program promotes acceptance and provides for growth in a natural environment. Our purpose is to provide the necessary and quality care and services to individuals in extended-day sessions and to provide quality care to children in cooperation and collaboration with the Tuscaloosa County and City School Systems, and other area school systems. Services are paid for privately or provided as personal care and billed under the Medicaid waiver.

HSP Coordinator, QIDP: Tammy High (202) 345-3031, Ext 15,
hsp@UCPWA.org

CARE (LEAP) Program UCP of West Alabama

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
CARE (LEAP) Program	Persons with intellectual disabilities, developmental delay and Cerebral Palsy	To enhance the overall quality of life of children and adults with disabilities, as well as to promote independence in every day life skills.	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
Medicaid Waiver, private pay, United Way, Bellows, DMH	Bellows - >1% DMH - 70% United Way - 5%	Snacks/activities	Trained and qualified staff that are passionate in providing care, instilling knowledge, and advancing the quality of life of those who are easily unheard and unseen.

PROGRAM ADVANCEMENT

HEARTS Respite **UCP of West Alabama**

CEO/Executive Director: LaMonica Herron-McCoy

Person Completing Form: LaMonica Herron-McCoy

Email: executivedirector@ucpwa.org

Phone: (205) 345-3031

The HEARTS Respite Program (Help: Emergency and Respite Treatment Services) provides reimbursement for respite care to families of children (up to 19-years-old) with special needs. Parent training and support groups are also available. This program is available thanks to a grant from the Children's Trust Fund of Alabama.

Respite care services are temporary, short-term breaks for caregivers of children and youth with disabilities. Voucher Respite is designed to allow families to choose their own caregivers, offering flexibility of when, where and how much respite is provided. UCPWA is pleased to offer HEARTS Respite to counties within Alabama's 7th congressional district, including- Choctaw, Dallas, Greene, Hale, Marengo, Perry, Pickens, Sumter, Tuscaloosa, and Wilcox.

Project Director: Paula Peacock, (205)202-4292, pfpeacock@charter.net

HEARTS Respite UCP of West Alabama

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
UCPWA HEARTS Respite	Persons with intellectual disabilities, developmental delay and Cerebral Palsy	To enhance the overall quality of life of children and adults with disabilities, as well as to promote independence in every day life skills.	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
Grants, Hearts Respite, State of Alabama Department of Child Abuse and Neglect	Hearts - 3%, Children's Trust Fund	Grant proposal, location, transportation	Trained and qualified staff that are passionate in providing care, instilling knowledge, and advancing the quality of life of those who are easily unheard and unseen.

Childcare Enhancement with a Purpose

UCP of West Alabama

CEO/Executive Director: LaMonica Herron-McCoy

Person Completing Form: LaMonica Herron-McCoy

Email: executivedirector@ucpwa.org

Phone: (205) 345-3031

UCP of West Alabama recognizes the need for quality childcare options for children with disabilities. Childcare Enhancement with a Purpose (CCEP) is a state-wide training project, funded through the Department of Human Resources, which provides onsite training and ongoing technical assistance to childcare providers leading to the successful inclusion of children of all abilities.

Our training focuses on understanding typical child development and developmentally appropriate childcare practices. As a result, we are able to impact the care of *all* children with and without disabilities. The impact of our training has also raised the awareness for early identification of children at risk for developmental delays.

UCPWA Childcare Enhancement with a Purpose serves nine counties in West Alabama: Bibb, Choctaw, Fayette, Greene, Hale, Lamar, Pickens, Sumter, and Tuscaloosa.

Project Director: Paula Peacock, (205)292-4292, pfpeacock@charter.net

Developmental Specialist: Renelda Windham (205)242-6940

Childcare Enhancement with a Purpose

UCP of West Alabama

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
Childcare Enhancement with a Purpose Program	Persons with intellectual disabilities, developmental delay and Cerebral Palsy	To enhance the overall quality of life of children and adults with disabilities, as well as to promote independence in every day life skills.	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
Grants, UCPA, Childcare enhancement, Dept. Human Resources	Childcare - 9% UCPA - 13%	Grant proposal, location, transportation, training materials, activities	Trained and qualified staff that are passionate in providing care, instilling knowledge, and advancing the quality of life of those who are easily unheard and unseen.

Camp Hope

UCP of West Alabama

CEO/Executive Director: LaMonica Herron-McCoy

Person Completing Form: LaMonica Herron-McCoy

Email: executivedirector@ucpwa.org

Phone: (205) 345-3031

Camp H.O.P.E. stands for Helping Others Progress Equally. During this summer, we provided a camp experience for 15 individuals from the Tuscaloosa City and County School systems (ages 4-20). The hours of operation were from 7:30 am-5:30 pm, Monday –Friday. They were provided breakfast, lunch and snacks by the Tuscaloosa County Board of Education Summer nutrition program. The camp’s theme was traveling to many different and exciting places such as Mexico, Italy, Africa, Australia and Hawaii, to name a few. We involved the campers in a variety of age-appropriate activities, as well as providing them with a food experience from the place of study. Each week the campers would be allowed to carry home a “goodie” bag containing the activities they had completed that week. The camp participants were all private pay with the fees being as follows; weekly cost: \$125.00, and half-week: \$62.50. The overall experience was a fun, exciting and learning experience for all involved.

Camp Hope

UCP of West Alabama

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
Camp Hope	All children within Tuscaloosa County and Tuscaloosa city school districts	To enhance the overall quality of life of children and adults with disabilities, as well as to promote independence in every day life skills.	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
Grants, private pay	Grants, private pay	Staff, activities, meals, transportation	Trained and qualified staff that are passionate in providing care, instilling knowledge, and advancing the quality of life of those who are easily unheard and unseen.

Therapeutic Recreation

UCP of Central California

CEO/Executive Director: Jeffrey Snyder

Person Completing Form: Jeffrey Snyder

Email: jeffreys@ccucp.org

Phone: (559) 221-8272

UCPCC'S Therapeutic Recreation program began 30 years ago to provide "in-home" therapeutic care specifically designed to meet the needs of adults with development disabilities who were not able to leave their homes. Specially trained staff members visited clients once or twice per week to implement a program of exercise and recreation designed and monitored by a physical therapist to address specific physical conditions. Emphasis was also given to instructing family members as to how they could implement the program for their family member on a day-to-day basis. Today, the program has evolved to a largely center-based program with clients being transported to receive service. This advance has helped to reduce the sense of isolation often felt by those previously limited to "in-home" service and provides much greater social interaction and a sense of community.

Therapeutic Recreation UCP of Central California

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
Therapeutic Recreation	Adults (Older than 22) with various, severe developmental disabilities. Those with very limited opportunity to be out of their homes and in many cases out of a chair or bed. Those with severely limited mobility.	To strengthen unused muscles and limbs, stimulate blood flow, and advance overall health. Individualized programs designed and provided with training for support individuals	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
CA - DDS – Regional Center, and State funding including Medicaid waiver (billed by state) UCPCC fundraising.	DDS RC State and Medicaid waiver ...80% UCPCC Fundraising 20%	Equipment: \$7,500	Supervision by recreational therapist; ongoing staff training and coaching; training for individual support persons

Center for the Arts and Technology **UCP of Central California**

CEO/Executive Director: Jeffrey Snyder

Person Completing Form: Jeffrey Snyder

Email: jeffreys@ccucp.org

Phone: (559) 221-8272

The Center for the Arts and Technology is built on a community college model and provides adults with disabilities (called UCPCC students – by their vote) the freedom to elect their own course of study and activity. At the heart of the center is the Student/Staff Curriculum Committee, which designs the course electives for each trimester. Students select their course loads and are responsible for their participation and success. The various departments within the Center for the Arts and Technology include: Life Skills, Cooking, Student Store, Arts – Drawing and Sketching, Arts – Ceramic Design, Arts – Painting, Arts – Paper Mache, Performing Arts – Dance, Performing Arts – Theater, Performing Arts – Vocal, Performing Arts – Instrumental, Computer Technology – Basic Skills, Computer Technology – Advanced Programming. Student artists market and sell their art work – many of them receiving paychecks for the first time in their lives.

Center for the Arts and Technology

UCP of Central California

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
Center for the Arts and Technology	Adults - ages 22 and older (oldest participant is 87) with cerebral palsy, intellectual disability, Down syndrome, autism, brain trauma and other special needs	To create opportunities for self-expression, creativity, advanced communication skills and technological skills, as well as to enhance personal income.	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
State of CA - DDS Regional Center Fee for service, UCPCC Fund Raising, Bellows Grant, Sale of products with proceeds to participants.	CA DDS RS - 70% UCPCC Fund raising- 27% Bellows - 1% Sale of products 2%	Program is set - start of fees absorbed years ago. Startup for various annual art projects- \$5,000 Technology investment - \$10,000 annually.	Art Director to oversee and train staff - who "invites" talent of participants to be expressed. IT Director to oversee technology lab.

Parent and Me

UCP of Central California

CEO/Executive Director: Jeffrey Snyder

Person Completing Form: Jeffrey Snyder

Email: jeffreys@ccucp.org

Phone: (559) 221-8272

Parent and Me is a school readiness program focused on the needs of children from six months to five years. A parent, grandparent, or guardian must participate with each child enrolled, and siblings, within the same age range, are also welcome to participate. With strong emphasis on a bilingual approach, the program integrates children with various disabilities along with typical children from the community. California now requires an identified vocabulary of 2,000 words for a child to be admitted to school as well as the identified ability to create and relate, verbally, an original story. Local school teachers have expressed their appreciation that children coming through UCPCC's program have acquired these skills. More than 500 children and their families are currently being served throughout six separate sites operating morning and afternoon sessions year round. A very wonderful but unexpected outcome has been the increase in verbal and reading skills of the parents who participate.

Parent and Me

UCP of Central California

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
Parent and Me	Integrated population of all children, children with English as a second language	To prepare children, from birth to age 5, for success in public schools.	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
First Five Funding (CA tobacco tax money), Foundation Grants	First Five - 85% Foundations - 15%	\$50,000 to fund infrastructure for each Parent and Me Site (7 total); Funding from First Five Start up funds	Certified supervising teacher (Early Childhood education), PT, Speech Therapist, Occupational Therapist

Ballerina Dreams **Cerebral Palsy Association in Alberta**

CEO/Executive Director: Janice Bushfield

Person Completing Form: Janice Bushfield

Email: janice@cpalberta.com

Phone: (403) 543-1161

<http://www.cpalberta.com/pages/index/programs-edmontonschedule.php>

This program was started by a parent group in Edmonton who wanted to have a dance opportunity for their children. It started with six participants and now, almost four years later, has more than 30 participants of children, ages 13 and younger. It has also expanded into Calgary this year as Dance without Limits. This program has been featured on local TV, and local service groups have given substantial funds for recitals, etc. Parents also pay a portion of costs. The program combines physical therapy and dance to boost the child's confidence and self-esteem. A local dance instructor and physical therapist donate their time to the program.

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
Ballerina Dreams	Children with disabilities ages 5-13	Recital date therapy incorporated in dance lessons	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
No government funding for this	Service groups who love this local business and grants	Dance studio and human resources if volunteers are unavailable	Physiotherapists volunteer their time

START

Easter Seals UCP North Carolina & Virginia

CEO/Executive Director: Connie Cochran

Person Completing Form: Jacqueline Cavadi

Email: connie.cochran@nc.eastersealsucp.com

Phone: (919) 783-8898

Systemic Therapeutic Assessment Respite & Treatment (START) offers crisis prevention and intervention supports for individuals with intellectual developmental disabilities and co-occurring mental illness or challenging behavioral issues. START enhances existing systems of care through planned and emergency respite, crisis response, crisis-plan development and clinical service, as well as training and consultation to mobile crisis teams, disability and mental health service providers, residential providers, hospitals and medical communities, justice system, families and others. START recipients maintain stable living, reduced crises and hospitalizations, decreased symptoms and enhanced community supports. Services are implemented through community-based clinical teams and respite program.

Program Advancement

Name of Program

START: Systemic, Therapeutic, Assessment, Respite & Treatment
START provides community-based, proactive crisis intervention and prevention planning for individuals with intellectual/developmental disabilities who experience crisis due to behavioral or mental health issues. START enhances system of care, but does not replace existing services.

Core Elements: 1) Emergency & Planned Respite; 2) Crisis Support; 3) Clinical Services & Support; 4) Training & Consultation and 5) Collaborative Contact Service elements provided through START Clinical Teams and START Respite.

START Team Clinicians maintain a caseload of approximately 30 individuals. The Respite program has at least 4 respite beds - 2 for emergency need and 2 for planned respites. The Respite program and Clinical Teams work closely, facilitating planned and emergency respite access, clinical service support during respite, and transition home supports. Referral sources are individual's clinical home provider (e.g. case management), Mobile Crisis Teams, Inpatient Units, Developmental Centers, State Psychiatric Hospitals, residential providers, hospital emergency departments, physicians and family members. Unlike other crisis services that offer a discrete service at

START

Easter Seals UCP North Carolina & Virginia

time of crisis, START provides crisis intervention support, but then continues to work with the individual (for approximately 1 year) and their system of care to better understand the individual, strengthen the system of care and prevent future crisis from occurring.

Programmatic Outcomes

Individual Outcomes: 1) Maintained stable community living; 2) Engaged community supports; 3) Reduced crises, emergencies & and psychiatric hospitalizations; 4) Decreased behavioral and/or mental health symptoms

Community Outcomes: 1) Increased community crisis expertise; 2) Maintained cross-systems collaboration; 3) Utilized community resources; 4) Decreased referral to emergency and psychiatric hospital

Target Population

People 18 years and older with intellectual/developmental disability and co-occurring mental illness and/or complex behavioral challenges

Start-Up Funding Needed

\$1,146,000; of which \$83,000 was spent pre-service delivery. This year one/start-up was for 2 clinical teams and 1 respite program. Program has active caseload of approximately 250 adults from 25 counties in central NC.

Funding Mechanism

State DD/MH funds

Funding Sources (include % break out)

100% DD/MH funds

Specialized Expertise Required

Professionals with experience with intellectual/developmental disabilities and mental illness, as well as with crisis intervention prevention and community-based support. Medical Director – Psychiatrist (.10 FTE; Clinical Director - Psychologist(.25 FTE); Program Director, Licensed Master level clinician (Psychology, Counseling, Social Work); Clinical Team Leaders, Licensed Master's level clinician; Team Clinicians, Bachelor's level clinician, Qualified Professionals; Respite Director, Master level clinician, License Preferred; Respite Counselors, Bachelor level clinicians

Assistive Technology UCP of Kansas

CEO/Executive Director: Dave Jones

Person Completing Form: Dave Jones

Email: davej@ucpks.org

Phone: (316) 688-1888

UCP of Kansas provides financial aid toward the purchase of various types of assistive technology. Grants range up to \$2,500 per request. Approximately 250 individuals are assisted each year. Funding comes from a State grant, various United Ways across the state, foundations, contributions and grants from other civic and non-profit organizations. In 2010, more than \$170,000 was expended. By collaborating with other service providers, pooling resources and coordinating with insurance benefits, the total value of the equipment secured was more than \$650,000. By tracking and documenting both the value of the equipment and the number of collaborating agencies, it has become increasingly easy to "sell" the program to potential funders. UCPK can provide "outcome measurement" surveys and provide examples of accounting and reporting procedures.

Program Advancement
Name of Program
Assistive Technology
Programmatic Outcomes
Over the past 15 years, UCP of Kansas has assisted well more than 2,500 persons in purchasing various kinds of assistive technology. By coordinating insurance benefits and collaborating with other organizations in forming "funding packages" (and by providing partial funding toward the equipment purchases), UCP of KS has assisted families in securing well more than \$7 million worth of assistive technology. UCP-KS' share of this amount was approximately \$2 million. By tracking the total dollars generated in the formation of these "funding packages" and by tracking the various collaborating agencies, we have been able to demonstrate both our ability to leverage additional funding and to show our commitment to interagency cooperation. We have found this to be very attractive to potential funding sources such as foundations and governmental entities.

Assistive Technology

UCP of Kansas

Target Population
Persons with all types of disabilities and ages in need of assistive technology.
Start-Up Funding Needed
This will vary depending on anticipated number of clients in need. We started with a \$60,000 grant from a church-related foundation. Once we demonstrated how much could be leveraged, we were able to secure additional funding from KS Rehabilitation Services, United Ways and the Kansas Department on Aging.
Funding Mechanism
KS Rehabilitation Services, Kansas Department on Aging, private foundations, United Ways, individual donors
Funding Sources (include % break out)
Government Grants: 50%, Foundations: 20%, United Ways: 25%, Individual Donors: 5%
Specialized Expertise Required
Knowledge of potential sources for "outside" funding. Knowledge of various types of assistive technologies and reasonable pricing. Having cooperative relationships with equipment vendors and professionals, who prescribe and/or demonstrate assistive technology, is also a prerequisite.

Upper Peninsula Assistive Technology Center **UCP of Michigan**

CEO/Executive Director: Kathleen Brockel

Person Completing Form: Anne Shell

Email: shell@ucpmichigan.org

Phone: (517) 203-1200

The UCP Michigan Assistive Technology Center in the Upper Peninsula is an invaluable resource to schools, non-profit organizations serving people with disabilities, and the medical community. The staff help people get their equipment, train them to use it, and follow along with them as their abilities change and technology advances. The center helps sort through the numerous options available and tailors a product to suit an individual's need. The center also administers a loan closet and works closely with the local Center for Independent Living to provide AT services to adults.

Upper Peninsula Assistive Technology Center UCP of Michigan

Program Advancement
Name of Program
Upper Peninsula Assistive Technology Center
Programmatic Outcomes
In fiscal year 2010, this program provided direct service to 111 individuals, and an additional 149 were served via outreach, conferences, training and publications.
Target Population
The center provides services to students with disabilities in school districts in Marquette and Alger Counties. The center also partners with the local Center for Independent Living to provide AT services to adults.
Start-Up Funding Needed
Funding Mechanism
Funding Sources (include % break out)
The AT Center was originally funded by a grant from Michigan Rehabilitation Services and the Bellows Foundation. The center currently receives funding from the Michigan Department of Education Office of Special Education/Early Intervention Services to provide services to Upper Peninsula Intermediate School Districts. Adult services are funded by United Way of Marquette County.
Specialized Expertise Required
A background in specialized device training and assessment

PROGRAM ADVANCEMENT

Michigan Employment Loan Fund UCP of Michigan

CEO/Executive Director: Kathleen Brockel

Person Completing Form: Anne Shell

Email: shell@ucpmichigan.org

Phone: (517) 203-1200

The Michigan Employment Loan Fund was formed through a grant from the U.S. Department of Education Rehabilitation Service Administration. Low-interest financial loans can be used to buy employment-related equipment and training to use the equipment. Loan borrowers must use the equipment for self-employment or to work for an employer from home. Michigan residents with all disabilities, including seniors with age-related functional limitations, are eligible.

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
Michigan Employment Loan Fund	The mission of the Fund is to reduce or eliminate barriers to employment by providing low-interest loans for self-employment or to work for an employer from home. Michigan residents with all disabilities, including seniors with age-related functional limitations, are eligible.	Fiscal year 2009-2010: 13 employment loan apps received; 3 approved. An additional 5,860 people were served via outreach, conferences, training, and publications.	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
	A grant from the U.S. Department of Education's Rehabilitation Service Administration, plus matching funds		Loan underwriting experience

Michigan Assistive Technology Loan Fund

UCP of Michigan

CEO/Executive Director: Kathleen Brockel

Person Completing Form: Anne Shell

Email: shell@ucpmichigan.org

Phone: (517) 203-1200

The Michigan Assistive Technology Loan Fund is a program that allows persons with disabilities to borrow money at low interest rates to purchase assistive technology devices that allow them greater access, increased mobility, and enhanced communication and job opportunities. Allowable equipment includes but is not limited to, hearing aids, wheelchairs, motorized scooters, voice simulation systems, Braille equipment, telecommunications equipment, augmentative communication systems, environmental control units, computers, adapted recreational equipment, accessible home modifications, and modified vehicles. Training to use the equipment can also be included with the loan.

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
Michigan Assistive Technology Loan Fund	People with disabilities and seniors who need low-interest loans to purchase assistive equipment and devices	Fiscal year 2009-2010: 104 AT loan apps received; 17 approved. An additional 5,860 people were served via outreach, conferences, training, and publications.	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
	Grant from the U.S. Department of Education's Rehabilitation Service Administration, plus matching funds		Loan underwriting experience

Michigan Work Incentives Planning and Assistance UCP of Michigan

CEO/Executive Director: Kathleen Brockel

Person Completing Form: Anne Shell

Email: shell@ucpmichigan.org

Phone: (517) 203-1200

The Work Incentives Planning and Assistance (WIPA) project is a federally funded initiative to educate and assist individuals with disabilities, and those who support them, to understand the benefits and risks of going back to work, and/or increasing their work income. This project is for people with disabilities who receive Social Security Disability (SSDI), Supplemental Security Income (SSI) or both. UCP Michigan's trained and certified Community Work Incentives Coordinators work individually with people, gathering information to help them understand how to utilize the work incentives available to build a more secure financial future.

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
Michigan Work Incentives Planning and Assistance (WIPA) Project	This project is for people with disabilities who receive either Social Security Disability (SSDI), Supplemental Security Income (SSI) or both	Direct Services: 491 people; Via Outreach, Conferences, Trainings, Publications, Website: 803 people	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
	Social Security Administration- 70%		Specialized experience; SSA security clearance, Bachelor's degree, special WIPA certification

UCPlay

UCP of Los Angeles, Ventura & Santa Barbara Counties

CEO/Executive Director: Ronald Cohen

Person Completing Form: Clark Jensen

Email: cjensen@ucpla.org

Phone: (818) 782-2211

The UCPlay Project is United Cerebral Palsy's creative arts program dedicated to improving the education of students with Autism Spectrum Disorder and other developmental disabilities. The United Nations recognizes that play is the 'right' of every child. We use play and the creative arts to enable EVERY student to find their voice, develop social skills and connect them with classroom learning. Our curriculum meets the California State Board of Education content standards for theater and addresses the following:

- Language and communication
- Play and social relatedness
- Intensive development of literacy and numeracy
- Self management and independence
- Creative arts education

UCPlay

UCP of Los Angeles, Ventura & Santa Barbara Counties

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
The UCPlay Project	Children in the Autism Spectrum and children with other disabilities, K – 12 th grade.	The introduction of individual and group social skills, creativity, and expression through art, dance, movement and theater.	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
Two sources: 1.) Fee-for-service (schools, parent-groups, foundations). 2.) Fee-for-service in the area of professional development for educators and providers in the area of disabilities.		Participation in UCPlay professional development program: \$5K. Staffing position within affiliate service providers to implement program in the local community (\$20K-\$40K) for 1 FTE.	Through UCPlay's professional development program, we provide educators and service providers with the skills and education needed to carry out the program in their communities.

PROGRAM ADVANCEMENT

Seattle Brainworks PROVAIL (Seattle)

CEO/Executive Director: Mike Hatzenbeler

Person Completing Form: Mike Hatzenbeler

Email: mikeh@provail.org

Phone: (206) 363-7303

Seattle BrainWorks is a community-based Clubhouse program providing short and long-term support to people who have experienced traumatic brain injuries. Our mission is to empower survivors of brain injuries to relearn skills and create strategies that will help them reintegrate as happy and successful members of the community. The Clubhouse is based on the idea that "work is healing." Members and staff work side by side to operate the Clubhouse. Through participation in the Clubhouse, members are able to transition from being "patients" to again being active participants in life. At the Clubhouse, members work on strengthening relationships with friends and family, and gaining skills and accessing opportunities to pave the way back to work.

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
Seattle BrainWorks	Brain injured survivors	Assist brain injured survivors to re-learn skills and reintegrate back into the community.	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
Grants, Donations	\$120,000 annual budget with \$75,000 in state funding from dedicated TBI service fund and the remainder from fundraising		

PROGRAM ADVANCEMENT

Clinical Services PROVAIL (Seattle)

CEO/Executive Director: Mike Hatzenbeler

Person Completing Form: Mike Hatzenbeler

Email: mikeh@provail.org

Phone: (206) 363-7303

PROVAIL services enable children and adults with disabilities or injuries to maximize their performance and productivity at home, work, school, and in leisure activities. PROVAIL provides occupational, speech and assistive technology therapies to maximize individual communication, mobility and independence. Included is 5,000 hours of therapy annually for 300-350 clients. We also offer specialized dental care services for people with severe disabilities. The dental clinic provides training for dental and dental hygiene students at local colleges and universities. 300 patients are served annually.

Financial Goal: \$900,000 annual revenue; 75% Medicaid, 20% Medicare, 5% private insurance, schools, and miscellaneous private pay

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
PROVAIL Clinical Services	Children and adults with disabilities	Provide clinical services to children and adults with disabilities	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
	\$900,000 annual revenue; 75% Medicaid, 20% Medicare, 5% private insurance, schools, and miscellaneous private pay		

PROGRAM ADVANCEMENT

Community Living Program PROVAIL (Seattle)

CEO/Executive Director: Mike Hatzenbeler

Person Completing Form: Mike Hatzenbeler

Email: mikeh@provail.org

Phone: (206) 363-7303

PROVAIL's Community Living Program (CLP) provides supported living to adults with severe developmental disabilities. We provide 24-hour support services in 19 accessible, community-based homes throughout the Greater Seattle area. Each setting is a single-family home shared by three to four people. For many of our 65 clients, being part of our CLP is the first experience they have had living outside of an institutional, congregate care facility. These 24-hour support services allow people who might otherwise be confined to nursing homes and institutions the opportunity to:

- Live independently and actively
- Make own choices
- Participate in the community

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
PROVAIL Community Living Program	Adults with severe developmental disabilities	Provide supported living to adults with severe developmental disabilities.	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
	\$5.8 million contract with State Division of Developmental Disabilities; Medicaid HCBS Waiver funding		Support services, nursing services

Employment Services PROVAIL (Seattle)

CEO/Executive Director: Mike Hatzenbeler

Person Completing Form: Mike Hatzenbeler

Email: mikeh@provail.org

Phone: (206) 363-7303

PROVAIL provides Individual Supported Employment Services that helps young adults and adults with all types of disabilities secure and maintain competitive employment in the community. Clients develop career goals, find a business position that matches the employee's goals and skills, receive on-site training/orientation and obtain ongoing job/career support. More than 190 youth and adults receive services every year. To accomplish our mission we will support people with disabilities to:

- Secure and retain competitive employment
- Increase wages, benefits, job tasks and work hours as appropriate
- Establish connections to and contribute to their communities
- Develop relationships with a variety of individuals
- Engage in a wide range of activities
- Assist families and individuals to better understand the impact of wages on Social Security benefits and healthcare

Program Advancement			
Name of Program	Target Population	Programmatic Outcomes	
PROVAIL Employment Services	Young adults with disabilities	Provide employment services to young adults with disabilities.	
Funding Mechanism	Funding Sources (include % break out)	Start-Up Funding Needed	Specialized Expertise Required
	\$1.3 million in DD contract, DVR case funding and school district transition service contracts		A highly qualified team of professionals make up the Employment Services Team.

PROGRAM ADVANCEMENT

Camp LivitUp **UCP of the Mid-South**

CEO/Executive Director: Russ Ellis
Person Completing Form: Carol Garon
Email: cgaron@ucpmemphis.org

Phone: (901) 761-4277

Camp LivitUp is an eight-week day camp for children, ages 6-17, with different types of disabilities, including cerebral palsy, Down syndrome, autism, spina bifida, learning disabilities, mental retardation, and many more. Activities include: instructional swimming, music, snack time, arts and crafts, field trips and many more exciting activities! Camp LivitUp is for kids who want to meet other kids. Camp LivitUp is housed at the Jewish Community Center in Germantown. The goal is to break even at \$50,000. We measure success of this program by the continued repeat children that enter the camp year after year.

(Using the Social Enterprise Template):

Program Advancement				
Name of Program	Partners	Financial Goal (in dollars)		Time Frames for Profitability
8-Week summer Camp LivItUp	None	Break Even for 8 weeks \$50,000		
Resources Needed for Start Up	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this enterprise?
	We measure success of this program by the continued repeat children that enter the camp year after year.			Depends on challenges and open facilities available

RESOURCE DEVELOPMENT

Capital Campaigns: Road to Success or Organizational Misstep?

Doing homework determines game changer or game over
**by Michael Hill, Senior Vice President of External Affairs,
UCP National**

UCP affiliates are centers of entrepreneurship. Across the globe, the men and women who run UCPs are growing programs, finding alternative funding for services and continuously fighting to advance the civil rights movement for people with disabilities. All of that success often leads to one daunting recommendation: is it time for a capital campaign?

Capital campaigns can dramatically change the organization if they are successful, but there are far more examples of campaigns gone wrong that have left organizations with increased debt and mission creep. This white paper is meant to serve as a basic outline for UCP affiliates considering a capital campaign for new facilities, endowment growth, new restricted funds ... or all of the above.

Capital campaigns are no different than strong business plans for new enterprises. They require a period of study, detailed planning, early fund-raising to minimize exposure, and a public launch and follow-through that establish a trajectory of success. All campaigns – whether for facilities or program support – should be viewed in five stages:

- **STAGE 1:** ASSESS & PREPARE
- **STAGE 2:** ORGANIZE & PLAN
- **STAGE 3:** QUIET PHASE FUNDRAISING
- **STAGE 4:** PUBLIC PHASE FUNDRAISING
- **STAGE 5:** CAMPAIGN WRAP-UP

Capital Campaigns: Road to Success or Organizational Misstep?

Doing homework determines game changer or game over

STAGE 1: ASSESS & PREPARE



Organizations considering a capital campaign must take the time to do a deep analysis to determine whether the organization is ready to tackle such a large undertaking. Campaigns should follow the organization's mission and should be a part of the affiliate's strategic planning process. There should be substantial leadership buy-in from the board and executive team, and recognition that conducting a campaign is everyone's job: not just that of the ED, development director or Board Chair. Without broad buy-in, most campaign simply will not succeed.

Organizations considering a campaign can and should take deliberate steps to achieve success. There are four steps within Stage 1 that an affiliate will want to take:

1. Any campaign should be a part of a broader strategic planning effort. It is important that UCP affiliates develop a strategic plan that includes operational, fundraising and marketing plans complete with goals, tactics, timetables and person responsible. Any campaign should fit within the context of what the organization is trying to achieve as part of its broader mission. The old adage of "if you build it, they will come" is not an acceptable reason to launch a campaign and seldom holds true!
2. UCP affiliates considering a campaign should ensure that their Board of Directors/Trustees is ready to play a leadership role in the campaign effort. Campaigns require a diverse array of professional expertise. Your board must be comprised of people with appropriate backgrounds to ensure a successful campaign effort. Seek out volunteer leaders who have conducted other campaigns, are active fund-raisers, marketers and understand the complex legal hurdles that come with everything from zoning to complex financial arrangements.

It is **EMPERATIVE** that all board members make an annual financial commitment to your affiliate. Campaigns succeed because you can convince major donors to buy in to the vision. If your board isn't willing to contribute, most donors will not take you seriously. This

Capital Campaigns: Road to Success or Organizational Misstep?

Doing homework determines game changer or game over

- may mean that your first step in the process is re-orienting or recruiting a new board. Board giving policies should be in place and a very public conversation should take place with the board about its willingness to put its own financial muscle behind any campaign effort. Any board about to embark on a campaign to raise funds for a campaign should be comprised of individuals who are not only financially invested in the organization, but who are well connected and willing to use their network to facilitate introductions to other individuals and companies within the community to support your fundraising campaign.
3. Once your leadership has committed to conducting a campaign, the proposed project can be outlined. Organizations should design a campaign project that first and foremost achieves the goals of the affiliate's strategic plan. Don't try to figure out how much you can raise first, as you may surprise yourself. Design the campaign that achieves your strategic objectives, and ask your board and other key stakeholders to dream big.
 4. Now that your organization has information about the size and design of its proposed campaign, you will need to prepare a preliminary Project Budget. A budget will provide line item costs for many, if not all, of the following: acquisition costs (land, buildings); construction and/or renovation costs (contractor, insurance); interior design costs; systems (hard-, soft-, telecommunications); office equipment; marketing and communication costs (brochures, mailers, Flyers, DVD's, website, Internet); and fundraising costs (additional staff or fund-raising counsel, direct mail, on-line, events). This budget will serve as a baseline to test whether your campaign efforts are possible given your organization's current position and potential for success.



STAGE 2: ORGANIZE & PLAN

The second stage in constructing a campaign will have you take all the information you gleaned in Stage 1 and will put it to the test ... literally!

Capital Campaigns: Road to Success or Organizational Misstep?

Doing homework determines game changer or game over

In stage 2, UCP affiliates should commission a feasibility study. A feasibility study evaluates the organization's chance of conducting a successful campaign prior to the campaign's launch. Feasibility studies should be conducted by outside fundraising consultants or an objective third party. The study should:

- Determine how much money can be raised;
- Project the amount of time it will take to raise the money;
- Determine who within your stakeholder base has the capacity and inclination to make a leadership gift to the campaign;
- Create giving pyramids that show that the organization has – or believes it can obtain – the necessary donors to complete the campaign within the timeline called for in the study;
- Establish membership of a campaign steering committee or other leadership group who accepts responsibility for monitoring the effort on behalf of the Board;
- Assess your internal readiness to undertake a campaign (staffing, systems, bandwidth of the executive and board);
- Conduct an assessment of the public's perception of the affiliate and any issue the campaign hopes to address;
- Determine if the project has the support of the community.

A feasibility study is conducted by interviewing donors, volunteers and other stakeholders (government officials, other community leaders, and philanthropists) to gather their thoughts about the proposed campaign. These personal, confidential interviews are based on a statement of need, the pre-cursor to the campaign case statement. A case statement articulates the need of your affiliate's project and its importance to your community. The case statement lays the foundation upon which your campaign is supported -- it should comprise the argument that will persuade key stakeholders, major donors and campaign leaders to become involved. It explains why a donor's gift will make a difference to both the community and the UCP affiliate.

Once the feasibility study has been completed and shared with your organization's board and key stakeholders, it is time for the board to discuss the findings and decide upon an appropriate course of action. If your board decides to move forward with the campaign, they should retain appropriate external fundraising counsel and work toward developing a campaign goal

Capital Campaigns: Road to Success or Organizational Misstep?

Doing homework determines game changer or game over

and timeline; a finalized case statement; and related campaign materials. Outside fund-raising counsel is not an indicator that the organization or its staff is incapable of fund-raising. Outside counsel is meant to serve as an objective third party that can “speak truth” to both board and staff about the status of a campaign throughout its entire life cycle. Counsel should bring complementary skills to bear and help the organization steer clear or trouble should anything go awry in the campaign.

STAGE 3: QUIET PHASE FUNDRAISING



The “quiet phase” of your campaign is just as it sounds: it is the period in which the affiliate is raising money but has not publicly released the project, its goals or the status of its funding. In this phase, board and other campaign leadership is cultivating and soliciting the top tier gifts identified in the campaign gift table that will comprise the first half of the campaign total. The campaign gift table is a chart detailing the size and number of gifts needed to achieve your goal (see sample chart below):

Amount of Gift	Gifts Needed	Cumulative
\$150,000	1	\$150,000
\$100,000	1	\$250,000
\$ 50,000	2	\$350,000
\$ 25,000	6	\$500,000
\$ 10,000	10	\$600,000
\$ 5,000	20	\$700,000
\$ 2,500	40	\$800,000
\$ 1,000	100	\$900,000
\$ 500	200	\$1,000,000

Capital Campaigns: Road to Success or Organizational Misstep?

Doing homework determines game changer or game over

During the Quiet Phase your campaign leadership has two goals:

1. To set the tone of the entire campaign by making their own leadership gift (usually one the highest gifts for the campaign); and
2. To secure at least 50 percent of the total amount of money needed for the campaign. As you can see illustrated in the chart above, the top ten gifts, **just 3%** of all campaign gifts -- usually make up 50% of the campaign fundraising goal. The larger the top gifts made by the campaign leadership, the faster the campaign proceeds.

Best practices indicate that the organization should not enter the “public phase” of the campaign until more than half of the total needed is raised. In this way, the affiliate send a message to the community that the campaign is viable and well on its way to success.



STAGE 4: PUBLIC PHASE FUNDRAISING

Now that your campaign has secured more than 50 percent of your total campaign goal, it is time to make your campaign public. This is important because your organization's donors and supporters will now feel secure and confident in the campaign's success because leaders have invested in this community project and the campaign is at least half way, if not more, on its way to the campaign goal.

Emphasis now shifts toward getting the final 50 percent of campaign funds from lower level gifts -- representing about 95% of the remaining gifts.

While your board and campaign leadership group may have linked arms with the affiliate ED to secure these foundational gifts, the public phase is where all board members can and must participate to drive the campaign over the finish line. The public phase often includes smaller unveiling events, direct mail solicitations and broad appeals to your remaining stakeholder groups and communities. The public phase is often celebrated by a major public event and a communications strategy that released the case for support and status of the project to the mainstream media.

Capital Campaigns: Road to Success or Organizational Misstep?

Doing homework determines game changer or game over

STAGE 5: CAMPAIGN WRAP-UP



The final stage of your campaign is marked by the continuation of cultivating prospects/donors as well as collecting on pledge commitments. Often time the organization will host a grand opening or other similar type of event to celebrate the success of the campaign.

If your campaign has been conducted properly, you should have a brand new base of donors to solicit for annual support to your affiliate. It is imperative that you integrate the campaign's donors into the life of the organization by inviting them to ongoing events, and by sending status updates on the ways that their generosity made a difference to those you serve.

Not only will you have achieving a major strategic objective for your affiliate, you may have opened up a renewable source of support and goodwill in your community.

Michael Hill is Senior Vice President of External Affairs for UCP National. He has run two major campaigns in his career: one a \$5 million facilities and endowment drive while serving as Executive Director of The Regina A. Quick Center for the Arts at St. Bonaventure University, and the other as Campaign Director for Arena Stage, a Tony Award-winning regional theater in Washington, DC. The Arena campaign, a \$125 million effort to build a new home for the theater and increase its endowment, secured the largest gift ever made to a non-profit theater in the United States (\$35 million) and \$30 million in city government funding. Hill led the effort through its public phase, raising \$105 million during his tenure.

For more information: mhill@ucp.org

SOCIAL MEDIA IS THE WAY FORWARD FOR FUNDRAISING!

**by Joanne Dorn, Director of Development, Cerebral Palsy
Association in Alberta**

Social media is a fast-growing trend among nonprofits and is generating an increase in fundraising efforts through the power of peer-to-peer connections. Social media is an umbrella term that describes websites that connect individuals. We are all familiar with Twitter, Facebook and YouTube to name the top three social media sites out there, and these are your best free tools to promote and create awareness of your cause and its fundraising events.

Globally, statistics show that Facebook has more than 500 million active users, and Twitter has nearly 200 million users. As a growing organization, social media is our key to connecting a growing audience, as it has become the fastest, easiest and most cost-effective way to communicate. Here are some social networking functions and tools UCP can utilize to organize a social network peer-to-peer fundraising campaign:

Facebook – The most widely used social network. A person can promote their cause and fundraising efforts directly to the friends in their network

Twitter – A person can spread their message to the broad audience made up of their followers and their followers' followers using tweeting and re-tweeting.

LinkedIn – Works much like Facebook with its ability to share, feed, like, and provide status updates.

YouTube – This social media platform makes the fundraising story much more compelling, appealing, and personable to the donors. Participants can upload videos to more vividly tell UCP's story.

How the Cerebral Palsy Association in Alberta has used social media and had positive results.

Social networking is becoming "the way of the future," and we recognized the opportunity to capitalize on this. We jumped on board with Facebook and Twitter a few years ago and have continued to incorporate it as a part of our communication tools.

SOCIAL MEDIA IS THE WAY FORWARD FOR FUNDRAISING!

We are approaching our 5th Annual Life without Limits Challenge this September and for the past three years have been using Facebook and Twitter as a means of publicizing the event, encouraging participation, recruiting volunteers and collecting pledges. Over the years we have seen an increase in participation, and the awareness of the event has spread through the peer-to-peer connections

Getting Started

The first thing we did was ensure our organization was listed on all available page outlets. These included a general Facebook profile for the organization, a group page, and then we also signed up for a cause page. This directed traffic to at least one of these links and, from there, we were able to increase our fans/friends and reach a wider network. To set up these links on Facebook, visit their help section for more detailed instructions on how to create your organization's profiles.

Once this was in place, we invited people to join, starting with our staff's friend lists and so on. The fans/friends increased to provide us with a larger network of connections, which in return gave the organization a growing audience to communicate and spread our messages.

The next step is to create an event under your organization profile. In our case we promote all the Life without Limits events and invite all friends/fans to participate or share the event with their network of friends. It is always important to remember to direct the viewer back to your website, where they can read about the events, programs and see what else the organization is doing.

As the ability to share your team/individual pledge pages evolved, we started sharing them via status updates and asking our networks to consider either joining a team or making a pledge to a team/individual. This proves to be an amazing and invaluable tool.

Recently I registered a team for the upcoming challenge, as I have a son with Cerebral Palsy. I put a photo of him up on his adapted bike, wrote a

SOCIAL MEDIA IS THE WAY FORWARD FOR FUNDRAISING!

small blurb asking for pledges, and within 25 minutes of me posting this to Facebook, he had received over \$300 in pledges. Just think - I was only one participant who sent out this message. The potential to combine social networking and fundraising together is endless.

Registering your organization with Twitter, local online event listings, blogs and community websites are other great ways to promote your events and increase your fundraising. Twitter is a simple way to share links rather than write ups and redirect your audience to an event page or website.

Social media is a tool that can assist in raising a great deal of awareness and dollars for your organization along with attracting new volunteers and donors. However, it works well when it is used as a part of a multi-channel approach, so do not stop with your posters/flyers and listings on community boards, newsletters, etc. Social media is definitely a great way to recruit people for events, and to build deeper relationships with your networks.

We must discover creative and innovative ways to fully integrate social media into our communication, our programs and, of course, our fundraising. Together, with the millions of users out there on the web, we can make a difference.

For more information: jdorn@cpalberta.com

Brian Sturgeon Run **UCP of Central California**

CEO/Executive Director: Jeffrey Snyder

Person Completing Form: Jeffrey Snyder

Email: jeffreys@ccucp.org

Phone: (559) 221-8272

The Brian Sturgeon Run is actually four events in one:

A "Kid's Run" (about a half mile) hosted by Ronald McDonald; A two-mile run; A two-mile walk; and a 6-K run, which is part of the Central California Runner's Series in which serious runners win competitive points for participation. Now in its 33rd year, this event is named for an athlete with cerebral palsy, Brian Sturgeon. Corporate sponsorships and participant registration fees, from approximately 600 individuals, generate funds to support the program services of UCPCC.

Brian Sturgeon Run **UCP of Central California**

Resource Development				
Activity		Partners	Financial Goal (in dollars)	Time Frames for Profitability
Run/Walk - 33 year history - The Brian Sturgeon Run		Local businesses, State-wide/Regional Bank, Local Insurance brokers	\$25,000 net	Dependent on sponsorships and participants. - 600-800 runners/walkers
Resources Needed for Kick-Off	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this activity?
Strong volunteer base; Race Director secured financial sponsors	Reach target NET \$\$ goal. Percent of expense to net should not be over 25%	History, media materials, log design	Event is named for long-time program participant. Event includes individuals with disabilities as participants. Strong educational opportunities for mission and disabilities.	Very positive for community visibility. Inclusion of people with disabilities. Fairly easy to pull off.

Life Without Limits Goes Legally Blond

UCP of Central California

CEO/Executive Director: Jeffrey Snyder

Person Completing Form: Jeffrey Snyder

Email: jeffreys@ccucp.org

Phone: (559) 221-8272

"Life Without Limits Goes Legally Blond" is a theatrical event being held at a local dinner theater. UCPCC has purchased the house for a Sunday brunch performance and is selling tables at a "stepped up fee." The highlight of the day is the pre-show which will be performed by the students and staff of UCPCC's Performing Arts Department. Their performance will be a huge draw to the local news media and provide the opportunity to spread the word about "Life Without Limits!"

Life Without Limits Goes Legally Blond

UCP of Central California

Resource Development				
Activity		Partners	Financial Goal (in dollars)	Time Frames for Profitability
"Life Without Limits Goes Legally Blond"		Local Dinner Theater, Community performers	\$10,000 net	Ongoing
Resources Needed for Kick-Off	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this activity?
Ticket sales, raffle resources	Opportunity for our Performing Art Students to perform in public, also appear on local TV as performers. Also display and sale of student art	Media Materials Outline	Opportunity for our performing art students to give public performance and also appear in TV media spots prior to the event.	Opportunity for those we serve to perform - reflect a very positive image of people with disabilities as full participants in society and positive image of UPC.

Tribute Dinner

UCP of Central California

CEO/Executive Director: Jeffrey Snyder

Person Completing Form: Jeffrey Snyder

Email: jeffreys@ccucp.org

Phone: (559) 221-8272

UCPCC hosts a Tribute Dinner about every 4–5 years. This year's joint honorees are a local couple that has been heavily involved in support of local charities and has raised more than \$100,000 for the long-standing VIP program of our affiliate. The evening will include a video of their community support and the presentation of the UCPCC Humanitarian of the Year Award.

Tribute Dinner

UCP of Central California

Resource Development				
Activity		Partners	Financial Goal (in dollars)	Time Frames for Profitability
Tribute Dinner with presentation of Humanitarian Award		Local Businesses , Fresno Travel and Visitors Agency.	\$75,000 Net	Dependent on appropriate honoree
Resources Needed for Kick-Off	How did you measure success?	What tools can you share to replicate this enterprise ?	How is this enterprise mission-related?	Why should others engage in this activity?
Sponsorship, Strong Committee support, Table sales	Net income, % of expenses, positive exposure for affiliate	Complete outline will be available	Recognize long-time volunteer couple and great opportunity to highlight program; serves and agency mission in advance publicity; outreach to a new community of donors.	Highlight mission/agency; recognize volunteers

Life Without Limits Challenge

Cerebral Palsy Association in Alberta

CEO/Executive Director: Janice Bushfield

Person Completing Form: Janice Bushfield

Email: janice@cpalberta.com

Phone: (403) 543-1162

www.lifewithoutlimits.ca

This walk/wheel/run began 5 years ago, replacing the great stationary bike race and subsequent bike-a-thon. It is very family orientated, with the majority of participants being families, friends and workers of our clients. It is held the third Saturday in September in Calgary and the third Sunday in Edmonton. This allows us to capitalize on advertising, promotional materials, etc. Our major sponsors are medical supply companies that work closely with our families. It is held in a park with a 5K walk/wheel, and a 20K bike course. We provide T-Shirts, water bottles, bags and coupons. Entertainment and emcees are local media hosts.

Life Without Limits Challenge

Cerebral Palsy Association in Alberta

Resource Development				
Activity		Partners	Financial Goal (in dollars)	Time Frames for Profitability
Life Without Limits Challenge 5K run/walk/wheel		Motion Group of Companies (medical supply vendor) is naming sponsor	\$50,000 net	Annually
Resources Needed for Kick-Off	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission- related?	Why should others engage in this activity?
Prizes, development staff, host site, corporate sponsorship, and participants!!	Number of participants registered. Pledges!	Critical time path, logistics, marketing materials, post-event analysis	Participants are mostly members or supporters of organization. Wheelchair component, ability stations to demonstrate challenges PWD face.	Lot of fun, great way to meet members

Management Services Alleghenies UCP

CEO/Executive Director: Marie Polinsky

Person Completing Form: Allen Hockenberry

Email: mpolinsky@alucp.org

Phone: (814) 262-9600

The goal of professional management services are to ensure every manner of efficiency is utilized in providing quantity and quality of services to our consumers. Cost savings are dependent upon initial assessment of needs but can be realized as soon as six months. Success is measured through multiple venues focused around increasing efficiencies and eliminating waste; but the most important aspect is complete buy-in from all levels of the organization. The agency as whole and individual programs will inherently feel the stabilizing effect of a reduced reliance on non-traditional funding sources.

Resource Development
Activity
Management Services
Financial Goal (in dollars)
The goal of professional management services are the goals of any growing organization: to ensure every manner of efficiency is utilized in providing quantity and quality of services to our consumers.
Time Frames for Profitability
Dependent upon initial assessment; cost savings through increased efficiencies can be documented within six months. Some initiatives will inherently take longer as phased implementation may be necessary such as the implementation of a data gathering system.
Partners
Choices People Supporting People and affiliates including service provision entity Alleghenies Unlimited Care Providers
Resources Needed for Kick-Off
The most important aspect for success is complete buy-in and acceptance of development initiatives from senior leaders in the organization. Beginning programs can begin with simple office software progressing to database creation, which follows a natural progression to more sophisticated data collection systems.

Management Services

Alleghenies UCP

How did you measure success?

Success is measured through multiple venues to include but not limited to: duplicity elimination, FTE maximization and/or re-tasking, man hours per project, real dollars from procedural cost savings, etc.

What tools can you share to replicate this enterprise?

We have samples of our primary tools, which are the Management Team Scorecard and process maps which are described further in separate submissions. We can also make available demonstrations of our telephony and data collection systems. In addition, we have experienced staff who have gone through the implementation of these systems and continue to provide support in their active use.

How is this enterprise mission-related?

By increasing efficiencies in the traditional management team oversight role, there is inherent give-back to programs through an increase in quality, quantity and timeliness of services provided.

Why should others engage in this activity?

By decreasing costs of overhead, you immediately add stability to the organization by reducing reliance on outside non-traditional funding sources, including agency foundations.

Small Miracles

Easter Seals UCP North Carolina & Virginia

CEO/Executive Director: Connie Cochran

Person Completing Form: Jacqueline Cavadi

Email: connie.cochran@nc.eastersealsucp.com

Phone: (919) 783-8898

Small Miracles is relationship-based approach to raising friends and money. Development, program and volunteer leaders host potential donors and friends (individuals, foundations, corporations) to inspirational Point-of-Entry tours. Staff and volunteer leaders continue to personally steward participants to connect further with the mission, and to attend annual Small Miracles ask-events. Mission- and vision- touches are incorporated into all elements of the program. Advisory councils, board members, service recipients and families, development and program staff all have essential roles in Small Miracles success. Across agency, Small Miracles raises approximately \$250,000, as well as numerous ongoing volunteer and philanthropic partners.

Resource Development

Activity

From September-March, Small Miracles is a program that provides one-hour inspirational sessions to introduce members of the community to the great work of Easter Seals UCP. A casual lunch in an informal setting is served, followed by a brief overview of mission and services. A program takes place next, and the program closes with a testimonial from a consumer or family member whose life has been impacted by Easter Seals UCP. No solicitation of funds takes place at this event. This effort is coordinated by development staff, with Program Staff and Volunteer Advisory Councils. Attendees – individuals, corporations, local businesses, foundations, civic groups and others – are invited via personal 1-1 invitation to a tour. Following tours, people & organizations are stewarded in relationship-building and engaged in various activities. In spring, we hold free one-hour fundraising Small Miracles events (luncheon or dinner). The event includes a presentation by the CEO, parent or individual testimonial, and an “ask” is facilitated by a volunteer – typically a Board Chair, Board Member or Development Advisory Council leader. Corporate sponsors underwrite costs, so all proceeds go to affiliate needs. Volunteer Advisory Council members and staff members host tables, and all attendees are invited through a personal 1-1 invitation from their table host.

Small Miracles

Easter Seals UCP North Carolina & Virginia

Financial Goal (in dollars)
Varies according to community size, organization's market presence, and length of history implementing Small Miracles in the market. We currently have Small Miracles programs in 4 key markets. Examples: Large market, (Charlotte): \$100,000, Small market: \$15,000-20,000.
Time Frames for Profitability
7-8 months
Partners
Corporate partners help underwrite costs so all proceeds go to affiliate cause. Volunteer Development Advisory Councils in each market partner with Development & Program leaders to promote activity, personal host potential philanthropists, volunteers, advocates and collaborators.
Resources Needed for Kick-Off
<ul style="list-style-type: none"> -Development Staff assigned to coordinate monthly tours and ask event; -Program staff for leadership in mission touches, tours and recruiting parents or individuals for testimonials; -Parent/Individual Participants to provide testimonials; -Volunteers with Community Reach – often volunteers of influence and affluence who can leverage their connections to invite and host individuals, corporations, foundations, etc. to tours and event
How did you measure success?
<ul style="list-style-type: none"> -Monthly tour participation -People, business, or organization engagement (contributions, volunteering, resources, PR, facilitating connections); -Meeting or exceeding financial contributing goals; -Multi-year donations; -Small Miracles Society giving level participation.
What tools can you share to replicate this enterprise?
<ul style="list-style-type: none"> -Approach training and guidance; -Small Miracles tour and event format; -Tour and ask event planning tools; -Tour and ask event mission-touch collateral examples; -Recognition practices.

Small Miracles

Easter Seals UCP North Carolina & Virginia

How is this enterprise mission-related?

- Raises financial and resource support for investment in organization's program operations;
- Hands-on view of mission through tours, testimonials, and other touches at events (children's performances, profiles/successes of children & adults, video presentation, mission-touch favor).

Why should others engage in this activity?

Small Miracles is effective in raising funds and has generated multi-year giving commitments. The relationship-based approach stewards people to support the agency because they see and believe in the mission. Gives people, companies, foundations and other organizations options for engagement. Small Miracles raised community awareness of organization and needs of children and adults with disabilities, and their families.

Eggstravaganza

Easter Seals UCP North Carolina & Virginia

CEO/Executive Director: Connie Cochran

Person Completing Form: Jacqueline Cavadi

Email: connie.cochran@nc.eastersealsucp.com Phone: (919) 783-8898

The Eggstravaganza is a signature, adult, black-tie Easter egg hunt and reception. The event features an adult egg hunt, silent and live auctions, music, food and drink. The Eggstravaganza is distinguished by exceptional venues and activities. The black-tie evening is hosted at a unique site, such as Richmond's LaDifference international furnishings showroom. The fundraising occasion includes an art-show at a local gallery and preview party silent auction. The preview functions feature egg-themed artwork by local artists, whose pieces range from whimsical to serious. Since 2002, the event has cumulatively raised \$700,000. The 2011 Eggstravaganza raised almost \$100,000.

Resource Development	
Activity	
Easter Seals UCP Eggstravaganza is an adult, black-tie, Easter Egg Hunt that includes a live and silent auction. Please note that 70% of the event's revenue is from event sponsors, the other 30% of the revenue is generated by tickets sales and proceeds generated by the live and silent auctions the night of the event.	
Financial Goal (in dollars)	
\$100,000 (net) This goal has increased with event longevity and presence. In 2010, the goal was \$74,000.	
Time Frames for Profitability	
Profitable within event planning year with relevant financial goal. 1 year prior: location, date and committee members are confirmed. 7 months prior: detail planning commences with committee meetings, sponsor and item asks.	

Eggstravaganza

Easter Seals UCP North Carolina & Virginia

Partners
Media Sponsors (in-kind radio spots provided regarding the event); major event sponsors (exclusive title sponsor for 2011 was the Page Auto Group at \$15,000; three presenting sponsors at \$10,000; 1 opportunity sponsor at \$5,000; 3 dignity sponsors at \$3,000; and more than a dozen sponsorships ranging from \$1,000 to \$250). Sponsors range from local businesses, large corporations, foundations and individuals.
Resources Needed for Kick-Off
A special events or development manager from the organization is needed to either chair the committee or be very involved in the planning/overseeing the budget of the event. The most important resource that we need for this event is a large and highly dedicated committee—the Eggstravaganza Committee has more than 20 members. The Committee should be very structured with specific roles assigned. For example, we have a sponsorship sub-committee (that handles the sponsorship asks), an auction item sub-committee that solicits the items for the live and silent auctions; this sub-committee is the largest. The Eggstravaganza had more than 200 individual items that were donated for the live and silent auctions this year). We also have a volunteer coordinator who signs-up volunteers to work the night of the event.
How did you measure success?
Our biggest measure of success was reaching our goal of \$100,000, which is the largest amount the event has raised in its 10-year history (in 2010 the event raised \$74,000); Success was also measured by attendance; our event location comfortably accommodates 200 people, and we sold out this year.
What tools can you share to replicate this enterprise?
Event planning guidance, example planning tools, budgets, and event PR and mission touch materials. Please visit the website from the year's event (it is still active as of 6/10/11): http://2011eggstravaganza.eventbrite.com . This is the most comprehensive source for information about the event (our sponsorship opportunities, item donation forms, complete list of sponsors are featured). Also, this year posted several of our live auction packages on the website about two weeks before the event and then set out a mass email to our constituents directing them to the website to take a "sneak peek" at the items that would be up for bid at the event this year. This seemed to create a lot of interest/excitement prior to the event; we even had a few folks who couldn't attend the event but sent in bids to us on

Eggstravaganza

Easter Seals UCP North Carolina & Virginia

some of the items. We would also suggest the use of social media, such as Facebook (if it is relevant in the affiliate's market) and create a site just for the event. We did this for the first time this year and periodically posted updates about the event on the Facebook page, as well as pictures from the previous year's events. This is a very simple and free way to advertise the event and reach a larger audience than the organization may already have access to.

How is this enterprise mission-related?

This year we incorporated a "Bid for the Kid" portion into the Live Auction. Attendees could make bids to send our clients to Camp; this portion of the live auction raised more than \$10,000. Prior to the beginning of the live auction, one of our Honorary Ambassadors and her father came on stage. Her father spoke about how much Easter Seals UCP has meant to their family. We also played our agency's video while the guests were mingling prior to the beginning of the live auction, and the program given to each attendee when they arrived at the event featured several pages highlighting our agency's mission and the programs provided in Richmond and throughout the state of Virginia.

Why should others engage in this activity?

The Eggstravaganza puts a unique spin on the traditional black-tie auction in that it incorporates an "adult Easter Egg" hunt. In addition to raising a significant amount of funds for the organization, there are many opportunities for us to incorporate the mission into the night of the event. Because of the unique nature of the event, we typically receive a good amount of media attention.

Young Benefactors

UCP of Southeastern Wisconsin

CEO/Executive Director: Yvonne Stueber

Person Completing Form: Yvonne Stueber

Email: ystueber@ucpsew.org

Phone: (414) 329-4500

The Young Benefactors of United Cerebral Palsy of Southeastern Wisconsin are devoted to the promotion of the UCP mission and vision.

This is a volunteer group of successful, socially-conscious and motivated individuals, ages 21-36, who are committed to supporting children, adults and families affected by any disability to reach their goals of independence and productivity.

UCP brings together a group of young professionals who share a common goal: to increase the awareness and resources to advance the mission of UCP through special events and creative fundraising opportunities. YB's also help to forge new relationships that build UCP's visibility and impact through educational and advocacy events

Young Benefactors

UCP of Southeastern Wisconsin

Resource Development				
Activity		Partners	Financial Goal (in dollars)	Time Frames for Profitability
Young Benefactors		M & T Bank, Hartland Insurance and other leading companies in Milwaukee	\$5,000 first year	1 year
Resources Needed for Kick-Off	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this activity?
Kick off included \$300 seed money for appetizers at a new bistro, \$700 for advertising and planning events for the year	Attendance at events as volunteers and planning Young Benefactors fund raisers to increase visibility for the 25-to 40-year-old professionals.	Marketing tools.	Supports advocacy and community education, as well as raising money for services not covered by current funding.	This endeavor increases visibility to a younger group of individuals and creates a venue for future board membership.

Heart of America Chili Challenge

UCP of Northwest Missouri

CEO/Executive Director: Teresa Gagliano

Person Completing Form: Teresa Gagliano

Email: tgagliano@ucpnwmo.org

Phone: (816) 364-3836

UCP's Heart of America Chili Challenge has taken place the first Sunday in March at the St. Joseph, Missouri Civic Arena for the past 25 years. In the beginning the event raised around \$5,000. The event has grown annually to where, in 2011, the Chili Challenge raised \$127,000.

Things start heating up for UCP's annual Chili Challenge in January of each year. This annual fundraising event is a fun-filled day which packs the Civic Arena with dedicated chili-cooking contestants and a huge public crowd. The doors open to the public at 11:00 am, and they can get free sample of chili from the contestants at 2:30 pm. Two auctions, a flea market, live music, dancing, and games for the children all add to the festivities.

There are many ways our supporters' help this fundraising event be a success.

Event Sponsor– Major sponsors receive recognition on official event T-shirts, recognition on other printed materials and in broadcast promotions and free booth space to compete in the Chili Challenge. Sponsors range from \$500 to \$2,500. Sponsors accounted for 20% of the revenue.

Contestants – Teams come together, gather their favorite chili recipe and join in a friendly competition for best chili, best decorated booth, and the coveted People's Choice Award. 58 teams show up at 8:00 am the day of the event and start decorating their booths and cooking their chili on-site. Entry fees are \$35 for amateur and \$55 for professional. In the beginning this is how the event raised the money; last year it was 2.5% of the proceeds.

Auction Donor – Individuals donate a service, a new item or a themed basket of items for individuals to bid on (online auction and silent auction).

Judge – Individuals pay \$15 to be a judge. 12 teams with 5 judges per team determine the winners in the amateur and professional divisions.

Attendees - \$3 for Adult, \$1.50 for children.

Heart of America Chili Challenge UCP of Northwest Missouri

PEOPLE'S CHOICE AWARD – KEY INGREDIENT TO THE SUCCESS OF THE EVENT

While teams enter into a friendly competition for best chili, another competition is going on called the People's Choice. This award goes to the team that individually raises the most money for UCP. This is the division that has grown over the years and is the reason for the increase in revenues for the event. In 2000, the People's Choice raised \$5,000. Over the next 11 years this part of the competition heated up, and, in 2011, the teams raised \$89,000 (70% of revenue) with the majority raised by 9 teams.

Resource Development				
Activity		Partners	Financial Goal (in dollars)	Time Frames for Profitability
Heart of America Chili Challenge		Local Miller distributor	\$127,000	March
Resources Needed for Kick-Off	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this activity?
Sponsors	Number of teams participating, number of people attending, amount raised compared to cost of the event	Rules, Timeline, Sample forms for: registration sponsors auction People's Choice	Supports programs that provide the services	Engages individuals who end up supporting the agency for the long-term. Unique event if there is not one already in your area. Low-cost event; not a lot of overhead.

Team UCP Race Event

UCP of Greater Cleveland

CEO/Executive Director: Patricia Otter

Person Completing Form: Patricia Otter

Email: totter@ucpcleveland.org

Phone: (216) 791-8363

Team UCP, a group of supporters who join together to raise funds and awareness for UCP of Greater Cleveland through racing and volunteering at the Cleveland Triathlon, was formed in 2008. Since then, the team has grown from 65 athletes and 50 volunteers to 400 athletes and 200 volunteers. Using an existing race as a platform, expenses are kept at minimum and focus remains on 'friend-raising' by participants. Client families honor their children by racing and building teams to participate and raise dollars online, through small events and donations. Team UCP now raises more than \$200,000 and attracts local media attention.

Team UCP Race Event UCP of Greater Cleveland

Resource Development
Activity
Official charity of the Cleveland Triathlon (annual event held in August)
Financial Goal (in dollars)
\$80,000
Time Frames for Profitability
Profit expected immediately upon completion of this annual event
Partners
Pacific Sports (Triathlon Producer)
Resources Needed for Kick-Off
Temporary or permanent staff (1-2) to partner with race producer to support the race with 140 volunteers on race day, development of sponsorships, development of a kick-off event, and educating and signing up racers (some parents of UCP children)
How did you measure success?
Net profit (split by corporate sponsorships and race participants' fundraising efforts)
What tools can you share to replicate this enterprise?
Flyers about race, potential race producer contacts, budget layouts
How is this enterprise mission-related?
The triathlon, as an endurance race, mirrors the endurance required by children in our therapy sessions. The parents, families and friends of those children test their endurance in support of those children. The funds raised are available for general operating expenses, which support all of our children's and adult programming.
Why should others engage in this activity?
It has been successful in both fundraising (profits increase each year) and awareness building. Participation in volunteering and racing has increased for three consecutive years. It also provides a "wellness" plan for staff.

Fright Factory **UCP of West Alabama**

CEO/Executive Director: LaMonica Herron-McCoy

Person Completing Form: LaMonica Herron-McCoy

Email: executivedirector@ucpwa.org

Phone: (205) 345-3031

Features a state of the art haunted house attraction. The haunted house is operated by a host of volunteers from the community and area schools. The event usually runs days prior to Halloween and ends Halloween night. Volunteers serve as actors (monsters, chainsaw men, spirits, deceased in coffins, etc.) to scare haunted house visitors. The layout is designed to move the crowd along safely to eliminate harm and injury. One of the actors guides safe movement throughout the house by getting behind the crowd and forcing them to follow a lighted path. State of the art equipment is the key in getting the crowd to crave or desire the excitement of being scared!

Fright Factory

UCP of West Alabama

Resource Development				
Activity		Partners	Financial Goal (in dollars)	Time Frames for Profitability
State fair Fright Factory / fair haunts		Board of Directors, Carnival companies, volunteers, local police department, business sponsorship	\$100,000 +	Sept 29 to October 10 for state fair and haunts
Resources Needed for Kick-Off	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this activity?
Funds to secure fairground rental, lighting, the ability to have a preview party for those who have donated time and monetary resources	Success will be measured by revenue vs. expenses and community feedback	Contacts on carnival suppliers and information about how to initiate and manage relations with carnival providers and community support	This major fundraiser gives us the ability to fund programs with new and better services that impact overall quality of life of those served and their families	Others should engage as it not only gives back to the community and benefits a charitable organization but it brings a fun-filled event to the local community. This also enhances local revenue.

Do Not Attend Event **UCP of Hudson County**

CEO/Executive Director: Keith Kearney

Person Completing Form: Keith Kearney

Email: kkearney@ucpofhudsoncounty.org

Phone: (201) 436-2200

UCP of Hudson County's "Do Not Attend" event is essentially a direct mail campaign with a two-to three-month defined period. A formal invitation is sent out through the U.S. mail to our entire database asking the recipient to "buy tickets" to a dinner that will never take place. In the invitation, we point out that because there will be no dinner, the recipient will not have to purchase a dress, get their hair done, secure and pay for a baby sitter, etc. We ask that they send us a donation, in part, for being considerate of their time.

Do Not Attend Event UCP of Hudson County

Resource Development
Activity
Do Not Attend Event is a direct mail campaign targeted to individuals who are already familiar with our affiliate. We asked for a \$50/ person donation for the privilege of not having to spend the money you would had spent had we had a dinner dance (i.e. hair dresser, dress, babysitter, time, etc.).
Financial Goal (in dollars)
\$15,000 in the first year. We hope to eventually bring in \$50,000 with this project.
Time Frames for Profitability
Immediate
Partners
None
Resources Needed for Kick-Off
Just the cost of invitations and postage. We did our invitations in-house. We did get the local paper to publish a story about the "event."
How did you measure success?
We were looking for a 5-7% return rate in the first year. We raise approximately \$12,000. After a complete analysis, we determined we should have asked for \$100/ person in our market.
What tools can you share to replicate this enterprise?
We would share the invite and the entire process, as well as what worked and what didn't.
How is this enterprise mission-related?
We raised \$12,000 in unrestricted funds for our operations.
Why should others engage in this activity?
If your affiliate does not have the capacity to net \$50,000+ from an actual dinner, this was a much simpler way to bring in funds. Because we targeted people who were already familiar with our organization, we got an 8% return the first time out.

An Evening of Wine **PROVAIL (Seattle)**

CEO/Executive Director: Mike Hatzenbeler

Person Completing Form: Mike Hatzenbeler

Email: mikeh@provail.org

Phone: (206) 363-7303

PROVAIL puts on an evening of Wine, Wine Tasting and Auction Event every November. The event is hosted by the McKinstry Company, a large local building mechanical contractor. A senior executive at McKinstry Company is a PROVAIL Board member and parent of former client. Several local wineries offer tastings, and donations of wine are procured from wineries, Board members and individual donors. More than 140 people attend this event held in the McKinstry Innovation Center. Financial Goal: \$15,000 with ROI of 2.50.

An Evening of Wine PROVAIL (Seattle)

Resource Development
Activity
An Evening of Wine
Financial Goal (in dollars)
\$15,000 with ROI of 2.50.
Time Frames for Profitability
Annual event
Partners
McKinstry Company, Wineries
Resources Needed for Kick-Off
Corporate sponsor; wineries to donate wine and participate in wine tasting. Auction committee; development committee with project manager managing event.
How did you measure success?
Number of guests; number of new donors; gross and net revenue; ROI
What tools can you share to replicate this enterprise?
Marketing & communications materials
How is this enterprise mission-related?
Community outreach and education
Why should others engage in this activity?
It's a good opportunity to collaborate with other organizations. It gets our message and mission out to a new audience, and it tends to be an audience that has more financial resources than the average person.

Golf Classic & Auction

PROVAIL

CEO/Executive Director: Mike Hatzenbeler

Person Completing Form: Mike Hatzenbeler

Email: mikeh@provail.org

Phone: (206) 363-7303

PROVAIL's Golf Classic & Auction is an 18-hole scramble tournament with a 144-person field. Primary sponsorship comes from the Pacific Northwest Insurance Council, a group of local insurance industry professionals that organized 10-years ago specifically to support this event. Sponsorships typically range from \$1,000 to \$5,000 with individual golfer spots at \$500/person. Event includes dinner, silent and live auction following golf. Also includes a million dollar shoot-out. Golfers pay to be included in a drawing where three men and three women are selected to get three chances to make a golf shot for a million dollar prize, to be split with PROVAIL.

Golf Classic & Auction PROVAIL

Resource Development				
Activity		Partners	Financial Goal (in dollars)	Time Frames for Profitability
Golf Tournament		Pacific Northwest Insurance Council; Golf Club	Golf sponsorships typically gross \$100,000; auction typically generates \$40,000-\$50,000 gross; ROI is usually around 2.00.	Annual Event
Resources Needed for Kick-Off	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this activity?
Auction committee, golf club, development committee.	Number of sponsors, number of golfers, gross and net revenue, \$ ROI	Sponsorship materials, golfer registration and auction invitation materials	Community outreach and education	It's a good opportunity to collaborate with other organizations. It gets our message and mission out to a new audience, which tends to be an audience that has more financial resources than the average person.

Wyckoff Luncheon & Awards Ceremony

PROVAIL

CEO/Executive Director: Mike Hatzenbeler

Person Completing Form: Mike Hatzenbeler

Email: mikeh@provail.org

Phone: (206) 363-7303

The Wyckoff Luncheon & Awards Ceremony is an annual fundraising event held in October. The following awards are handed out:

- The Wyckoff Award for Inspiration
- The Wyckoff Award for Individual Merit
- The Wyckoff Award for Advocacy
- The Rose Reinhart Award for Lifetime Achievement
- The Wyckoff Award for Corporate Partnership
- The Wyckoff Award for Philanthropy

Approximately 175 friends and supporters attend, including Board members, senior staff and major donors serving as table captains. This year's goal is to increase attendance to 250. No cost to attend but suggested donation of \$150.

Wyckoff Luncheon & Awards Ceremony PROVAIL

Resource Development				
Activity		Partners	Financial Goal (in dollars)	Time Frames for Profitability
Wyckoff Luncheon & Awards Ceremony		Auction item donors, Sponsors	Typically generates \$40,000-\$50,000 gross with ROI of 2.00.	Annual event
Resources Needed for Kick-Off	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this activity?
Auction committee, Development committee with project manager to manage the event. Client video prepared for event.	Number of guests, number of table captains, number of new donors, total \$ raised, ROI	Marketing and communication materials	Community outreach and education	It's a good opportunity to collaborate with other organizations. It gets our message and mission out to a new audience and, it tends to be an audience that has more financial resources than the average person.

Might & Power Race Day Event

Cerebral Palsy Alliance

CEO/Executive Director: Rob White
Person Completing Form: Marcus Blease

Email: mblease@cerebralpalsy.org.au

Phone: (02) 9479-7265

The Might and Power Race Day is a fundraising event named in honor of the famous racehorse Might & Power and is hosted by chairman Nicholas Moraitis AM. Tickets for a table of ten are \$1,980. Ticket includes racecourse entry, race-book, and three-course lunch with beverages. Guests are treated to 8 races across the day that they can gamble on as well as a fashion parade featuring the latest Autumn/Winter fashions and on-stage entertainment. Over the past 10 years, the Might and Power Race Day has raised more than \$3.2 million.

Might & Power Race Day Event

Cerebral Palsy Alliance

Resource Development				
Activity		Partners	Financial Goal (in dollars)	Time Frames for Profitability
Might & Power Race Day Event				1 year
Resources Needed for Kick-Off	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this activity?
Design organization willing to donate; business partners willing to donate services (program printing, signage, advertising, etc.); Caterer, Fashion Show coordinator; Photographer. It's important to have a Development Committee for resources & support, and a Project Manager to manage event from beginning to end.	To be determined		Community outreach and education	It gets our message and mission out to an audience that has more financial resources than the average person

CBD Golf Escape Cerebral Palsy Alliance

CEO/Executive Director: Rob White
 Person Completing Form: Marcus Blease
 Email: mblease@cerebralpalsy.org.au

Phone: (02) 9479-7265

The CBD Golf Escape is a family friendly golfing weekend with a Friday and Saturday stay. While golfers play all day Saturday, partners are treated to wine tasting, fashion shows, make up and beauty sessions, and the children are entertained all day at a "kids club." Fundraising is undertaken with a live and silent auction at a large gala dinner on the Saturday evening. Many large auction items are donated including vehicles and holidays. Advertising packages get donated from prominent media organizations.

Resource Development
Activity
CBD Golf Escape Event
Financial Goal (in dollars)
Time Frames for Profitability
Resources Needed for Kick-Off
Golf course, fashion show; business partners willing to donate services (program printing, signage, advertising, etc.); photographer. It is important to have a Development Committee for resources and support, as well as a Project Manager to manage event from beginning to end.
Partners
How did you measure success?
What tools can you share to replicate this enterprise?
Silent auction committee
How is this enterprise mission-related?
Why should others engage in this activity?
It gets our message and mission out to a new audience, and it tends to be an audience that has more financial resources than the average person.

CP Challenge Event Cerebral Palsy Alliance

CEO/Executive Director: Rob White
Person Completing Form: Marcus Blease
Email: mblease@cerebralpalsy.org.au

Phone: (02) 9479-7265

The CP Challenge is an 8-week team activity that runs from September to October. The Challenge requires participants to form a team of 4 people. Each participant will then track their daily step count (via a pedometer) or other fitness activity and record this on a personalized CP Challenge webpage. Once registered, each participant is sent a kit (including fitness and fundraising tips) and two pedometers. Participants are encouraged to undertake online fundraise with all proceeds supporting people with CP. This event will form the fundraising pillar of World CP Day. This website is available for white-labeling to any UCP member.

Resource Development				
Activity		Partners	Financial Goal (in dollars)	Time Frames for Profitability
CP Challenge Event				
Resources Needed for Kick-Off	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this activity?
Provide kit: fitness and fundraising tips, 2 pedometers. Website set up to support fundraising.				It's been a good opportunity to collaborate with other non-profits and service clubs. It gets our message and mission out to a completely new audience.

20/Twenty Challenge

Cerebral Palsy Alliance

CEO/Executive Director: Rob White

Person Completing Form: Marcus Blease

Email: mblease@cerebralpalsy.org.au

Phone: (02) 9479-7265

The 20/Twenty Challenge involves a 2km swim, 3km kayak and 20 km walk. Participants are asked to reach a fundraising target of \$2,000 per person (\$8,000 per team). Once registered, a fundraising page is automatically created for each participant. The 20/Twenty Challenge was initiated by James Hodgkinson (Macquarie Group Foundation) in 2004. James was inspired by his nephew Alex Graham, who has CP. Since the inaugural event, the 20/Twenty Challenge has raised more than \$2.6 million to purchase more than 1,400 items of communication and mobility equipment for children with cerebral palsy.

Resource Development				
Activity		Partners	Financial Goal (in dollars)	Time Frames for Profitability
20/Twenty Challenge				
Resources Needed for Kick-Off	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this activity?
		Fundraising page on website.	Proceeds go to purchase communication and mobility equipment for children with cerebral palsy.	

Ride of Your Life **UCP of the North Bay**

CEO/Executive Director: Margaret Farman

Person Completing Form: Ann Elias

Email: aelias@ucpnb.org

Phone: (415) 307-5896

Ride of Your Life is dependent on our relationship with a club that provides rides in historic stock cars. It requires a racetrack that is a willing partner (Infineon Raceway). Rides are sold to individuals who want to ride "shotgun" in one of the historic stock cars. Rides sell for a minimum of \$1,000 per person. Rides can be sold at auctions and raffles. Corporate Sponsorships include: Bronze: \$1,000; Silver: \$2,500; Gold: \$5,000; and Platinum: \$10,000, which includes four rides that are great for corporate teambuilding. The first year of the event raised \$15,000, the second year \$40,000, and hopefully \$50,000+ the third year.

Ride of Your Life UCP of the North Bay

Resource Development
Activity
Corporate Sponsorship
Financial Goal (in dollars)
Year 1: \$15,000, Year 2: \$40,000, Year 3: \$75,000
Time Frames for Profitability
See financial goal
Partners
HSCRS (Historic Stock Car Racing Series), Infineon Raceway, individuals who purchase rides, service clubs and businesses willing to put on events to reduce staff time and expense.
Resources Needed for Kick-Off
Business Partners, partnership with HSCRS (Historic Stock Car Racing Services), raceway willing to partner, photographer. It is important to have a Development Committee for resources and support, as well as a Project Manager to manage event from beginning to end.
How did you measure success?
Amount received
What tools can you share to replicate this enterprise?
Corporate sponsorship packet, silent auction to generate bidding on rides, eBay to sell rides, video of event on website, banners of sponsors at event, on website and on materials
How is this enterprise mission-related?
All proceeds go to UCPNB Recreation Programs
Why should others engage in this activity?
It's been a good opportunity to collaborate with other non-profits and service clubs. It gets our message and mission out to a completely new audience.

Sonoma Designers Showcase

UCP of the North Bay

CEO/Executive Director: Margaret Farman

Person Completing Form: Ann Elias

Email: aelias@ucpnb.org

Phone: (415) 307-5896

Our Fundraising Committee Chair is also the Co-Chair of the Interior Design Society. The event is collaboration between IDS and an established community group – the Rotary Club because of the intensive need for volunteers. The proceeds are split between Boys and Girls Club (Rotary charity), Kenwood Educational Fund (Rotary charity), and UCPNB.

Needed: A contractor who has an exceptional property, design group to design each room, and businesses willing to donate printing, advertising, and photography. The event promotes UCPNB to a new, affluent audience. IDS and the Rotary Club manage the event, with UCPNB volunteering many hours and selling advance ticket

Sonoma Designers Showcase UCP of the North Bay

Resource Development
Activity
Event
Financial Goal (in dollars)
First-year profitability and increase of revenues year over year
Time Frames for Profitability
First year
Partners
Rotary Club, Interior Design Society of the Wine Country, Kenwood Education Foundation, Boys & Girls Clubs of Central Sonoma County, service clubs and businesses willing to put on events to reduce staff time and expenses
Resources Needed for Kick-Off
Transportation services; a design organization willing to donate; a service club willing to coordinate volunteers; a contractor who has property appropriate for a showcase; business partners willing to donate services (program printing, signage, advertising, etc.); photographer. It is important to have a Development Committee for resources and support, as well as a project manager to manage event from beginning to end.
How did you measure success?
To be determined
What tools can you share to replicate this enterprise?
How is this enterprise mission-related?
Community outreach and education
Why should others engage in this activity?
It's been a good opportunity to collaborate with other non-profits and service clubs. It gets our message and mission out to a new audience, and it tends to be an audience that has more financial resources than the average person.

\$1,000 Donor Club **UCP of the North Bay**

CEO/Executive Director: Margaret Farman

Person Completing Form: Ann Elias

Email: aelias@ucpnb.org

Phone: (415) 307-5896

The \$1,000 Donor Club was designed to encourage 100 donors to make an initial gift of \$1,000 or increase their gift to \$1,000 annually. The goal: raise \$100,000 for our recreation services by encouraging a monthly, affordable pledge of \$83.33. Individuals may also form groups to join – making giving even more affordable. Donor packets, donor software, website donation, and campaign DVD are required. It is important to have a Project Manager and a Development Committee. Donors are developed from business associates, social enterprise partners, and families. The campaign provides an opportunity to “help change a life, starting with your own.”

RESOURCE DEVELOPMENT

\$1,000 Donor Club **UCP of the North Bay**

Resource Development
Activity
Individual
Financial Goal (in dollars)
\$100,000
Time Frames for Profitability
One year
Partners
Service clubs, individual families receiving services, business partners (i.e. insurance agent, benefits agents, banker)
Resources Needed for Kick-Off
List of prospects, donor packet materials, donor management software (we use eTapestry), UCPNB Website, DVD (a critical piece of the marketing materials). It is important to have a Development Committee for resources and support, as well as a Project Manager to manage project from beginning to end.
How did you measure success?
Amount received.
What tools can you share to replicate this enterprise?
Donor Packet materials including DVD.
How is this enterprise mission-related?
The program is geared toward giving the donor an opportunity to participate and make a difference. "Help change a life...starting with your own."
Why should others engage in this activity?
All affiliates have the potential to solicit individual donor gifts within their community. It's a personal way of getting donors to participate in your mission. Once donors are established, you can invite them to renew/increase their pledge each year.

Race for Independence

UCP of Arkansas

CEO/Executive Director: Larry Stang
Person Completing Form: Larry Stang
Email: Larry@ucpcark.org

Phone: (501) 580-3528

Date: March 19, 2011

Location: Pinnacle Hills Promenade, Rogers

It couldn't have been a better first year for United Cerebral Palsy's "Race for Independence." There were nearly 300 participants for the 5K, chip timed race and the ½ K walk and roll for people of all abilities. The race raised more than \$17,000!

Jack Ford, Chair of the race and father of a child with Cerebral Palsy, stated, "The kids who were at the race put so much effort into doing the simple things we take for granted, like walking." Many of the kids who attend ConductAbility, a program for children with motor disorders, participated in the ½ K walk and roll. Kids rode adaptive bikes, many were in wheelchairs or strollers and then got out and crossed the finish line walking. It was a very inspiring moment for everyone at the race to see the effort and the positive attitude demonstrated by the kids.

For more information, please visit our website at ConductAbility.com, and click on the "2011 Race for Independence" button.

Contact: Julie Lolley, Development, United Cerebral Palsy of Arkansas
jlolley@ucpcark.org Ph: 479-966-4322, ext. 225, Cell: 479-957-2022

Race for Independence

UCP of Arkansas

Resource Development
Activity
Race for Independence - 5K Run - Chip Timed - 1/2K Walk or Roll for people of all abilities. Many children and young adults with motor disorders participated by riding adaptive bikes, riding in strollers or wheelchairs, and many kids got out of their wheelchairs and walked the last few yards across the finish. Big, enthusiastic crowd was on hand to cheer them on. It was a great opportunity for many in the running community to see the effort it takes kids with motor disorders to do a simple activity most of us take for granted. It was very uplifting for everyone involved. All special needs participants were awarded medals at the ceremony following.
Financial Goal (in dollars)
Year 1: \$15,000 Net, Year 2: \$20,000 Net
Time Frames for Profitability
\$15,000 Net in Year 1
Partners
See website at http://www.register-wizard.com/event/?ID=1009
Resources Needed for Kick-Off
Website for Run, On-line registration: http://www.register-wizard.com/event/?ID=1009 Sponsorship and participation by area's largest running club. Product sponsorship: T-shirts, goodie bags, drinks, snacks. Great Location: No charge, fully accessible, all set-up and clean-up donated. Parade permit and coordination with local police department.
How did you measure success?
More than 250 participants and 40 volunteers. Many more spectators and supporters. TV, social media, magazine and newspaper coverage of the event. Many new exposures to our organization and cause.
What tools can you share to replicate this enterprise?
Registration website to use as an example. Fliers for sponsorship solicitation and for the event. Ideas for on-line places to advertise the event. Press releases.

Race for Independence

UCP of Arkansas

How is this enterprise mission-related?

On-line registration was linked from our main website landing page. This raised the awareness level of our cause with the general public. People with all levels of motor impairments participated in a big athletic event... without limits. They got to experience the excitement and sense of accomplishment that comes with crossing a finish line.

Why should others engage in this activity?

Everyone who was there the day of the event expressed how enthusiastic, supportive and gracious the running community was, especially with the kids with disabilities. It was a "feel good" event for everyone who participated.

Make a Difference **Alleghenies UCP**

CEO/Executive Director: Marie Polinsky

Person Completing Form: Allen Hockenberry

Email: mpolinsky@alucp.org

Phone: (814) 262-9600

Through the First National Bank *Make a Difference*TM program, you can raise funds using the purchases that you make every day with your *Make a Difference Checking* account debit card. Here's how it works: When you open a new account, or change an existing First National Bank account, to a *Make a Difference* checking account associated with your organization, the organization automatically earns an initial donation of \$20 from First National Bank. Additionally, First National Bank will continue to donate to your organization an amount equal to 1/4% of all qualified purchases made with your *Make a Difference Checking* debit card.

Make a Difference Alleghenies UCP

Resource Development				
Activity		Partners	Financial Goal (in dollars)	Time Frames for Profitability
<i>Make a Difference™</i>		Parent company for Alleghenies UCP, Choices People Supporting people	Decrease costs through specific data monitoring	Time frames are dependent on available resources and implementation
Resources Needed for Kick-Off	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this activity?
Current data tracking methods including office software product or in-house data gathering methods to multi-systemic time and attendance automated reporting systems.	Success is measured by establishing up front baseline data and goals. Progress is then measured through regular measurement of key point indicators (KPI)	We have a comprehensive but also flexible in-home developed database that organizes data. We can also provide examples of BOD, management team & individual positional scorecard. We currently have on staff those who developed & implemented the concept brought to us.	By monitoring KPI's, an agency can quickly adjust to correct deficiencies in areas that directly impact the consumer such as, but not limited to, the reduction of service gap hours and no coverage needed situations.	The organization and then trending of data can be extremely helpful in anticipating changes to the service industry as it applies to your specific agency. Data provides the difference between reacting and educated anticipation.

SOCIAL ENTERPRISE

Solar Project Prospectus

by Dr. Al Condeluci, President & CEO, UCP/CLASS

Introduction

UCP affiliates are always looking for ways to generate dollars and be forward thinking in the process. Many UCP affiliates have large or multiple buildings that might provide roof opportunities for solar projects.

The solar design can not only can help affiliates stabilize our energy costs, but offers options for renewable energy credits, tax credits, rebates and the like. The solar project would use the Solyndra system, which is the newest light-weight, higher-power cylindrical devices that can cover 70%-100% of the roofs of our centers. Application is simple and starts with a roof preparation treated with a white, cool reflective lamination. Each cylinder is rated up to 230 Wp and capture direct, diffused, and reflected sunlight across a 360 degree photovoltaic surface. Solyndra panels can be placed in virtually any orientation and significantly closer together than conventional tilted panels. The unique cylindrical design allows wind to flow through the panels and, as a result, no additional ballast or penetrations are required in winds up to 130 mph. Designed for maximum performance in the rooftop environment, Solyndra panels offer superior wind, soiling and snow performance. The design and projections are not just energy efficient, but can be looked at as an investment.

How it Could Work

UCP affiliates could seek an investor or benefactor who might underwrite this project. Both scenarios yield a win/win in this exciting effort.

Option 1 - In this case a private investor (individual or company) is recruited that will buy the solar unit for the affiliate at the present quoted cost of \$212,500. Upon purchase and installation, this investor will be eligible for all the generous tax incentives, and will also be able to sell the SREC's (Solar Energy Renewable Credits). The pro forma on a \$212,500 investment shows a full return on investment (between tax incentives and SREC sales) within a 7-to 8-year period. At this point the investor can donate the unit to UCP and from that point the affiliate will benefit from SREC sales, generating a projected additional \$227,694 over the life of the unit.

Solar Project Prospectus

by Dr. Al Condeluci, President & CEO, UCP/CLASS

Option 2 - Here a benefactor (individual/foundation/corporation) will underwrite the cost of the solar unit as a grant to UCP for \$212,500. From the point of installation the affiliate will own the unit and although not benefit from any tax incentives, will be able to sell the SREC's immediately, and the pro formas suggest that the unit will generate \$317,665 over a 25-year period. This results in a \$105,165 dollars over the \$212,500 investment.

Conclusion

Solar energy and green technology will be a key element in a more sustainable environment. The sooner organizations move to convert to these options, the better our community will become. The options outlined in this prospectus offer a wonderful opportunity to not just save and convert energy, but to demonstrate to others in our field the possibilities that exist.

Al Condeluci, PhD
President & CEO, UCP/CLASS
412-683-7100 x 2122
acondeluci@ucpclass.org
www.ucpclass.org

Solar Project Prospectus

by Dr. Al Condeluci, President & CEO, UCP/CLASS

Social Enterprise
Business Description
<p>This program calls for the installation of a solar plant on the roof of our three-story building housing programs that support persons to live in the community. This project combines the latest in solar technology, cylindrical panels that absorb light on all sides, with a very advanced funding concept in which the investor is able to pay themselves back through a combination of tax credits, depreciation, redeemable solar credits and payment for energy and then donate the solar plant to our agency, which then benefits from the solar energy credits and producing some of our own electrical energy.</p>
Financial Goal (in dollars)
<p>Based on the size planned for our particular power plant, the solar plant would pay for itself and provide an additional \$225,000 to \$317,665 during the lifetime of the unit (depending on the investor arrangement).</p>
Time Frames for Profitability
<p>Again, based on the specific scope and parameters of our particular project, this goal would be reached over a 25-year period of time (the lifetime of the unit).</p>
Partners
<p>A roofing/solar contractor, investor(s)</p>
Resources Needed for Kick-Off
<p>There are two options involving an investor which is the main resource needed.</p> <p><u>Option 1</u> -An individual or company buys the solar unit for the affiliate (in our case at \$212,500.00.) Because this investor receives tax incentives, depreciation, SREC's (Solar Energy Renewable Credits), they are predicted to reach a full return on investment within a 7-to 8-year period after which the investor can donate the unit to the affiliate, which will benefit from SREC sales and energy production, generating a projected additional \$227,694 over the life of the unit.</p>

Solar Project Prospectus

by Dr. Al Condeluci, President & CEO, UCP/CLASS

Option 2 - A benefactor will underwrite the cost of the solar unit as a grant to UCP for \$212,500. From the point of installation the affiliate will own the unit and, although not benefit from any tax incentives, will be able to sell the SRECs immediately, and the pro formas suggest that the unit will generate \$317,665 over a 25-year period.

How did you measure success?

Success will be measured by finding the investor, producing a portion of our own electrical energy and redeeming solar credits to the point of meeting the financial goal previously described.

What tools can you share to replicate this enterprise?

We can share the contact information of our solar contractor and would be glad to discuss the plan they developed for us in more detail as an example of what can be achieved.

How is this enterprise mission-related?

Our mission is "Working toward a Community Where Each Belongs." Solar energy and green technology like what's being proposed in this project are key elements in creating a more sustainable environment. Maintaining our environment ultimately also serves to better the community that we are working so hard to make inclusive.

Why should others engage in this enterprise?

A solar power plant would help an agency stabilize if not reduce their energy costs, not to mention contribute to saving our environment

Copymatic Shop
Easter Seals UCP North Carolina & Virginia

CEO/Executive Director: Connie Cochran

Person Completing Form: Jacqueline Cavadi

Email: connie.cochran@nc.eastersealsucp.com

Phone: (919) 783-8898

Copymatic Document Solutions is a digital print business with the primary mission of providing inclusive employment for individuals with disabilities who work alongside individuals without disabilities. Services include digital printing, copying/binding, graphic design, bulk-mail services, customer documentation, and storage and inventory management. Customers of Copymatic include individuals, businesses, nonprofits, churches, universities, government agencies and other organizations.

Copymatic Shop

Easter Seals UCP North Carolina & Virginia

Social Enterprise
Business Description
Copymatic, a quick copy and print shop, employs and integrates adults with DD into the workplace. Printing, copying and bulk mail services to include: business cards, letterhead, envelopes, invitations, newsletters, brochures, manuals, etc.
Financial Goal (in dollars)
Financial goal was to break even. Only designed to provide jobs for people with DDs.
Time Frames for Profitability
Took 5 years before the program became profitable.
Partners
May need finances from bank or investors for start up (ESUCPNC self-funded. Medicaid and Regional Centers for funding. Must pick a good location for business success (5 failed due to location).
Resources Needed for Kick-Off
Lease or purchase copy equipment and a location. Need a manager who understands the business. Need a high-volume location (they are close to a college).
How did you measure success?
When individuals with DD are able to earn wages, live a better life and the program is fully funding itself.
What tools can you share to replicate this enterprise?
Advice, assistance.
How is this enterprise mission-related?
Support individuals to live/work/play in their community. Social Experience and a sense of pride.
Why should others engage in this enterprise?
Support individuals to live/work/play in their community. Social Experience and a sense of pride.

Go Green Recycling

Cerebral Palsy Association in Alberta

CEO/Executive Director: Janice Bushfield

Person Completing Form: Janice Bushfield

Email: janice@cpalberta.com

Phone: (403) 543-1162

Clothing Donation and refundable beverage container Pickup Program

<http://www.cpalberta.com/pages/index/how-donatecloting.php>

This program began in 1996, in partnership with Value Village stores (also known as Savers). We currently use telemarketers to call for household donations in Calgary and Edmonton. We also have more than 50 clothing donation bins throughout Alberta. A fleet of 8 vehicles then circulate throughout communities picking up clothing and now refundable beverage containers. A route typically consists of 50-60 homes and 3-4 bins. These are then delivered to local Value Village stores. We are paid by weight. Expenses can be extremely high considering staffing, leasing, fuel etc., so efficient planning of the operation is a key to success. Net revenues for this program are from \$500,000-\$700,000 per annum. Decorative trucks also bring key exposure to the organization.

Go Green Recycling

Cerebral Palsy Association in Alberta

Social Enterprise				
Business Description		Partners	Financial Goal (in dollars)	Time Frames for Profitability
Solicitation and home pickup of used clothing and household good and refundable beverage containers		Value Village Alberta Beverage Recycling Container Board	\$600,000 net per annum	12 months
Resources Needed for Start Up	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this enterprise?
Call center, dialer or web-based dialer, call center agents, residential database operations manager, trucks - one per route, drivers or owner operators, warehouse	number of homes reached, dollars generated per route	contract with Value Village is needed first or contract with alternative thrift shop	30% of call center agents have disability, all profits support programs and services	Marketing opportunities to showcase your presence in the community

SEDS- Transition to Work Program (TTW)

Cerebral Palsy Alliance

CEO/Executive Director: Rob White
Person Completing Form: Marcus Blease

Email: mblease@cerebralpalsy.org.au

Phone: (02) 9479-7265

The Disability Employment Service of SEDS helps people with a range of disabilities find employment and educational opportunities.

SEDS assists by:

- identifying career and educational pathways
- setting realistic goals
- providing accredited training and skills development
- preparing a resume
- job search and placement
- providing on-the-job training and ongoing support where appropriate

SEDS' successful employment outcomes are the result of its unique "Five Point Service Approach" which offers:

1. personalized assessment
2. vocational counseling
3. specialized training from workplace training consultants
4. placement of a qualified employee
5. post-placement support

SEDS- Transition to Work Program (TTW)

Cerebral Palsy Alliance

Social Enterprise				
Business Description		Partners	Financial Goal (in dollars)	Time Frames for Profitability
Disability Employment Services (SEDS)				
Resources Needed for Start Up	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission- related?	Why should others engage in this enterprise?
Sustainable partnerships, funding, knowledgeable and entrepreneurial leadership		Get to know the local economic climate and businesses open to partnering. Find out what business challenges are and present solutions that will lead to employment opportunities.	We create jobs for people with disabilities, which help to enrich lives & create a sense of contribution in the community we all live in. By doing this we support our mission to "...advance the independence, productivity and full citizenship of people with disabilities through an international affiliate network."	Social enterprises that create employment opportunities for people with disabilities fill a social need. Creating employment opportunities for this capable, underemployed and dedicated group within our society meets a very basic responsibility we all share, contributing to our local community.

Recycling and E-Waste Teardown

UCP of Stanislaus and Tuolumne Counties

CEO/Executive Director: Scott Webb

Person Completing Form: Scott Webb

Email: swebb@ucpstan.org

Phone: (209) 577-2122

The "Go Green with UCP" Program provides employment training/opportunities for people with disabilities. UCP's work crew, made up of people with disabilities, processes/sorts all materials. Electronic equipment is disassembled/sorted based on material type for recycling. Consumers learn how to use basic hand tools to disassemble and sort by various electronic equipment. Some consumers are part of a crew who pick up equipment from residential homes/businesses. For beverage containers, consumers will learn to collect and sort products based on material type. Both opportunities will coexist in one warehouse and will create an environment that promotes teamwork and collaboration.

Social Enterprise				
Business Description		Partners	Financial Goal (in dollars)	Time Frames for Profitability
Recycling and E-waste teardown		Local Business	\$10,000 per month	6 months
Resources Needed for Start Up	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this enterprise?
Warehouse space, workbenches, basic tools, Vehicle, collection containers, marketing materials	Satisfaction surveys from members (clients/employees) quality of employment training and profitability of program	Program design information, diverse revenue streams and products provided	Provides quality training environment and positive interaction with the community	Adds a diverse revenue stream and can expand into many smaller spin-off enterprises

Gone for Good **UCP Land of Lincoln**

CEO/Executive Director: Brenda Yarnell

Person Completing Form: Brenda Yarnell

Email: byarnell@ucpll.org

Phone: (217) 525-6522

Gone For Good is a coalition of four UCP affiliates providing secure document destruction for the Internal Revenue Service and commercial customers. *Gone For Good* was first established by UCP of Greater Birmingham in October 2006. UCP Land of Lincoln converted an existing document destruction enterprise to the *Gone For Good* model in October 2009. UCP of Arkansas also began operations in October 2009. UCP of the North Bay, our newest member, joined the coalition in October 2010. The business model was developed in partnership with NISH. Each UCP affiliate attended training provided by NISH to set up and operate a secure document destruction business that meets the stringent requirements of the Internal Revenue Services. NISH provided financing for a standardized equipment package and other start-up costs as well as ongoing technical support for operations.

The goal of each business is to provide training and employment for people with disabilities. For many years affiliates have tried to develop work opportunities for individuals who are severely disabled. Our goal has been to create jobs that can be broken down into small steps and would provide everyone the opportunity to participate in real work activities and to receive a paycheck. *Gone for Good* has provided the first real work experience for most of these individuals. The number of people with disabilities employed in *Gone For Good* has increased from 40 individuals in fiscal year 2007 to 130 in the current year, a 225% increase. In addition, of the 168 *Gone For Good* employees, 77% have a disability.

Gone for Good

UCP Land of Lincoln

Social Enterprise				
Business Description		Partners	Financial Goal (in dollars)	Time Frames for Profitability
Business Enterprises		NISH, UCP of Birmingham, Arkansas North Bay	\$2.5 million	most are currently profitable
Resources Needed for Start Up	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this enterprise?
depends on the business in terms of dollars; trained staff are key	number of people employed, satisfaction, wages/benefits profitability	there are models for both janitorial and document destruction	employing people with disabilities	employing people with disabilities and diversification of income for affiliate

Private Daycare
UCP of Hudson County

CEO/Executive Director: Keith Kearney

Person Completing Form: Keith Kearney

Email: kkearney@ucpofhudsoncounty.org

Phone: (201) 436-2200

UCP of Hudson County operates a private pay daycare center in a wealthy section of Jersey City, NJ. The daycare is fully integrated, and scholarships are available for low-income individuals with disabilities. The center was expensive to start up and took almost 5 years to achieve profitability. It requires an individual with intimate knowledge of running a daycare center and the licensing rules involved. Intensive study of the local daycare landscape is absolutely necessary, as it can be a very competitive field with many national players involved.

Private Daycare UCP of Hudson County

Social Enterprise				
Business Description		Partners	Financial Goal (in dollars)	Time Frames for Profitability
Private daycare services for children 6 months to 3 years of age		None	\$50,000 to \$75,000 in unrestricted funds annually (Fees range from \$1,000/month to \$1,500/month depending on child's age).	3-5 years
Resources Needed for Start Up	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission- related?	Why should others engage in this enterprise?
An appropriate facility. Early childhood education expert (on staff or consultant). Financial outlay of approximately \$100,000 in salaries and facility costs to get licensed	Profitability within 5 years	I would be willing to discuss the entire process with affiliates, as well as volunteer early childhood education specialists' time as well. Licensing process is likely to be different in each state.	We use the center as an educational center for parents. Classrooms are fully integrated.	It is not for the faint of heart. A lot of financial resources were used. We are four years in and just starting to turn a small profit. Field is VERY competitive with national chains involved.

UCP Wheels for Humanity
UCP of Los Angeles, Ventura & Santa Barbara Counties

CEO/Executive Director: Ronald Cohen

Person Completing Form: Clark Jensen

Email: cjensen@ucpla.org

Phone: (818) 782-2211

UCP Wheels for Humanity's (UCP WFH) is a non-profit organization whose mission is to provide increased self-sufficiency, mobility, and education to people with disabilities throughout the world, without regard to political affiliation, religious belief or ethnic identity.

UCP Wheels for Humanity collects, refurbishes and delivers wheelchairs to disadvantaged children and adults in developing countries. Since 1996, UCP WFH has helped thousands of children and adults with disabilities around the world gain increased mobility and dignity. UCP Wheels for Humanity is one of the few organizations that send volunteer physical therapists, occupational therapists and certified technology suppliers to individually fit clients to wheelchairs.

UCP Wheels for Humanity

UCP of Los Angeles, Ventura & Santa Barbara Counties

Social Enterprise				
Business Description		Partners	Financial Goal (in dollars)	Time Frames for Profitability
Collection and distribution of custom-fitted wheelchairs in 68 countries throughout the world.		USAID, providers of medical equipment, logistics, volunteer therapists.	Open	6-12 months
Resources Needed for Start Up	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this enterprise?
Investment in UCP/Wheels For Humanity franchising opportunity: \$25,000 annually.	Franchising partners generate funding support above and beyond expenses and start-up costs; Increase in wheelchair distribution and seating clinics	Participate in franchising opportunity	Addresses the mobility needs of children with disabilities throughout the world	It is an underserved audience. Marketing and messaging is uncomplicated and easy to communicate. Opportunities for individual donor, as well as large corporate relationships

Family Extended Care UCP of South Florida

CEO/Executive Director: Joe Aniello

Person Completing Form: Ray Call

Email: joe.aniello@ucpsouthflorida.org

Phone: (305) 325-1080

Family Extended Care is a network of six individual, not-for-profit corporations. Five of these corporations primarily serve the elderly with residential, day care and respite services in independent, assisted or memory impaired settings. The average age of the residents is greater than 80. There is one corporation that serves primarily people with Traumatic Brain Injury. The majority of the residents are private pay usually using their Social Security stipends together with their own financial resources to pay for these services. There are special licenses in some of the locations that permit a higher level of health care and/or limited mental health services. The first facility was opened 13 years ago with the newest opening in December.

Social Enterprise
Business Description
Living facilities for the elderly that provide independent and assisted living services, and are located outside of this affiliate's service area. They currently own 6 facilities, the largest with 100 living spaces, with profits exceeding \$850,000. This program is a nonprofit that is incorporated, not connected to UCP and does not have UCP consumers working at the facility. Funding to UCP comes from fees to the corporation for UCP handling managerial, administrative and home office duties.
Financial Goal (in dollars)
They are looking for a 15 - 20% return on investment (payments to UCP for overhead, management fee, profit). Usually need to go "big" to overcome overhead (smaller ventures typically don't pencil out).
Time Frames for Profitability
Goal is to break even after 18 months, longer would require too much start-up capital. Initial investment is preserved in the property; should be able to sell at or more than the initial purchase cost.

Family Extended Care UCP of South Florida

Partners
Need venture capitalist, foundations, banks, National UCP or affiliate partners for capital, or must have sufficient start-up capital. Need a funding source involved that understands the positive financial gains that can be had by partnering with a nonprofit that uses the seed money to create a fund generating business that can pay the funding back with interest. Joe has talked to UCP National about either National UCP or a partnership of UCP affiliates banding together to invest in UCP affiliates business ventures with short-term (5 years), low-interest loans.
Resources Needed for Start Up
Funding, funding, funding! Must hire a manager who is experienced in housing for the elderly. Must not restrict this manager to run the business like the UCP nonprofit; they are not similar and should not be treated as such. Compensation, rules, regulations, policies, procedures, employee work practices should all be treated differently.
How did you measure success?
ROI meeting expectations; providing a good product based on customer surveys
What tools can you share to replicate this enterprise?
No tools, just advice
How is this enterprise mission-related?
Actual business is not at all related to the mission of helping people with disabilities, but the business does help the elderly, and there is a very nice financial gain to our UCP (\$850,000 annually).
Why should others engage in this enterprise?
Because it allows UCP to provide \$850,000 worth of services to people with disabilities.

UCP Recycling
UCP of Arkansas

CEO/Executive Director: Larry Stang
Person Completing Form: Larry Stang
Email: Larry@ucpcark.org

Phone: (501) 580-3528

With the current economic conditions, non-profits much rethink strategies which provide a viable quality vocational training program to those we serve, while at the same time reducing our dependency on government funding. UCP of Arkansas decided if you embed a work training program within a for-profit business, you can provide quality training while achieving financial viability.

Through partnerships with GP/Harmon and the Secure Document Alliance, UCP of Arkansas opened a materials recycling facility (MRF) to achieve both outcomes stated earlier. Not only has this business created training and income, but we have been able to reach out to other non-profit agencies to provide work training for the people they serve.

For more information contact:

Dan Leslie, Business Development Director (501) 228-3814

Annette Johnson, Employment Services Director (501) 228-3816

UCP Recycling

UCP of Arkansas

Social Enterprise				
Business Description		Partners	Financial Goal (in dollars)	Time Frames for Profitability
Recycling for Georgia Pacific and Wal-Mart stores utilizing work activity program		Secure Document Alliance	\$250,000 income annually (income should equal expenses)	6 months
Resources Needed for Start Up	How did you measure success?	What tools can you share to replicate this enterprise?	How is this enterprise mission-related?	Why should others engage in this enterprise?
20,000 sq. ft. of warehouse space, vertical bailer and horizontal bailer	Number of jobs created by/for people with disabilities (est. at 30)	Our facility is available for on-site visits, and staff can provide technical assistance	Creating jobs for people with disabilities	Jobs provide a sense of dignity to people with disabilities. This provides steady work for your work training component.

Fabrication Division PROVAIL (Seattle)

CEO/Executive Director: Mike Hatzenbeler

Person Completing Form: Mike Hatzenbeler

Email: mikeh@provail.org

Phone: (206) 363-7303

Our light manufacturing facility was established in 1960, providing products and services to Boeing, other commercial firms in the Puget Sound area and the Defense Department. We currently employ 40 people with various abilities and disabilities in a safe, supportive, quality-driven manufacturing environment for competitive pay and benefits.

We provide ongoing, effective training for our employees emphasizing experiential "on the job training" and skill proficiency. Our Quality Management Systems are approved under AS9100 and ISO 9001:2008, and we use Lean Manufacturing principles to manage our operations.

Our manufacturing and quality departments provide a team of professionals who work together with a commitment to quality, while maintaining the flexibility and adaptability needed to meet customer requirements

Social Enterprise
Business Description
PROVAIL Fabrication Division
Financial Goal (in dollars)
Gross annual sales of \$2.7 million
Time Frames for Profitability
New contracts can take 12 months or more to become profitable depending on the customer
Partners
Boeing, Defense Department, Ability One
Resources Needed for Start Up
Sustainable Partnerships, Funding, Knowledgeable and Entrepreneurial Leadership
How did you measure success?
Quality and on-time delivery statistics, total number parts, gross sales, profit margin

Fabrication Division

PROVAIL (Seattle)

What tools can you share to replicate this enterprise?

Sheet metal stamping, milling and forming; routing, drilling, die cutting, ultrasonic welding, deburring, hand assembly, packaging, part marking, adhesive gluing/sealing. AS9100 and ISO 9001:2008 registered. AbilityOne product manufacturer since 1984 with the production of stainless steel clamp loops with flourosilicone and high-temp Teflon fabric cushions.

PROVAIL has these tools in its inventory, but they are not necessarily required to replicate this enterprise.

How is this enterprise mission-related?

Our employees with disabilities have greater economic independence and choice in their lives due to the income they earn in their competitive wage jobs. The profit generated at the Fabrication Division is used to support our direct service programs providing residential, employment & clinical services.

Why should others engage in this enterprise?

Social enterprises can provide agencies with greater financial diversity, helping them deal with funding reductions in other areas. Some enterprises provide employment opportunities for people with disabilities, although PROVAIL feels its essential that such employment should be as highly integrated as possible, offering competitive wages and job choices based on individual desires and capabilities—as close to a typical workplace as possible.

WineBev Services UCP of the North Bay

CEO/Executive Director: Margaret Farman

Person Completing Form: Ann Elias

Email: aelias@ucpnb.org

Phone: (415) 307-5896

At WineBev Services, we create jobs for adults with disabilities that enrich lives and contribute to the community. Our innovative business offers post-production wine packaging that supports prevailing wages and represents 25% of our revenue. WineBev Services is an adult day program supported with state funds that account for 75% of our revenue.

We strategically located WineBev Services near winery production, partnered with wineries, researched their challenges, and presented viable solutions leading to employment opportunities at our facility. Performance targets were established for three years. We also developed enclaves at wineries providing 4-5 hours of work daily at prevailing wages.

Social Enterprise
Business Description
WineBev Services
Financial Goal (in dollars)
By year four: \$750,000 in contract sales
Time Frames for Profitability
Month- to-month break-even within 36-48 months.
Partners
North Bay Regional Center, Transportation Connections, Treasury Wine Estates, Trincherro Family Estates, Constellation Wines, Don Sebastiani & Sons, Packaging Plus, Packaging Arts, Takara Sake USA, Straus Family Creamery, Quixote Winery, Gimbals Fine Candies, Clif Family Winery, Cline Winery, Napa Valley Vintners, Gorilla Shipper, Wine Institute, Sonoma Wine Company, Napa County Office of Education
Resources Needed for Start Up
Sustainable partnerships, funding, knowledgeable and entrepreneurial leadership

WineBev Services

UCP of the North Bay

How did you measure success?

We defined Performance Targets for the first three years and outlined a plan of action to reach set goals. We measured progress by setting annual budgets and analyzing financial data monthly. We will provide financial statements upon request.

What tools can you share to replicate this enterprise?

Get to know the local economic climate and businesses open to partnering. Find out what businesses challenges are and present solutions that will lead to employment opportunities.

How is this enterprise mission-related?

We create jobs for people with disabilities, which help to enrich lives and create a sense of contribution in the community we all live in. By doing this we support our mission "to enhance the quality of life of people with cerebral palsy and other disabilities, their families, and their communities."

Why should others engage in this enterprise?

Social enterprises that create employment opportunities for people with disabilities fill a social need. Nationally, the unemployment rate for a person with a disability is a staggering 70%. Creating employment opportunities for this capable, underemployed and dedicated group within our society meets a very basic responsibility we all share, contributing to our local community.

Gone for Good UCP of the North Bay

CEO/Executive Director: Margaret Farman

Person Completing Form: Ann Elias

Email: aelias@ucpn.org

Phone: (415) 307-5896

At Gone for Good, we create jobs for adults with disabilities that enrich lives and contribute to the community. Our business offers document shredding and document management including imaging. Revenue supports prevailing wages representing 25% of our revenue. Gone for Good is an adult day program supported with state funds accounting for 75% of our revenue.

We partnered with NISH and other businesses, researched their challenges, and presented viable solutions leading to employment opportunities. A business plan (available) was created with performance targets for three years. We recently added e-Waste recycling to provide additional jobs and revenue from recycled materials.

Social Enterprise
Business Description
Gone For Good
Financial Goal (in dollars)
To attain profitability
Time Frames for Profitability
Month-to-month break even
Partners
North Bay Regional Center, NISH, Secure Document Alliance, Transportation Connections, Stay Safe, Solano County Office of Education
Resources Needed for Start Up
Sustainable partnerships, funding, knowledgeable and entrepreneurial leadership
How did you measure success?
We will define performance targets for the first year and outline a plan of action to reach set goals. We measure progress by setting annual budgets and analyzing financial data monthly. We have created a business plan for this enterprise and would be happy to make it available to you upon request.

Gone for Good

UCP of the North Bay

What tools can you share to replicate this enterprise?

Apply for NISH partnership. Get to know the local economic climate and businesses open to partnership. Find out what businesses challenges are and present solutions that will lead to employment opportunities.

How is this enterprise mission-related?

We create jobs for people with disabilities which help to enrich lives and create a sense of contribution in the community we all live in. By doing this we support our mission "to enhance the quality of life of people with cerebral palsy and other disabilities, their families, and their communities."

Why should others engage in this enterprise?

Social enterprises that create employment opportunities for people with disabilities fill a social need. Nationally, the unemployment rate for a person with a disability is a staggering 70%. Creating employment opportunities for this capable, underemployed and dedicated group within our society meets a very basic responsibility we all share, contributing to our local community.

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Mission Driven Business

NEED HELP?

Whether you are looking to add programs, restructure existing lines of service or start a new social enterprise, Mission Driven Business (MDB) Consulting can assist you by leveraging the experience and strength of our network.



- In the past year, MDB has developed a new strategic plan that is resulting in an affiliate re-establishing its development department in conjunction with a new social enterprise. Also on schedule is exploring service area expansion and a new educational program.
- With another affiliate, MDB is working to determine the feasibility of starting a new Smart Home enterprise to serve people with developmental disabilities and the aging population in their own homes.
- In another case, we are helping restructure a development and marketing department for a large, established affiliate, including recruiting key personnel.

The way MDB works is like any outside consultant you would engage, except that we know you and your business from long, direct experience. We bring experts from across the country who are UCP executives and internal experts to work side-by-side with you and your staff to craft solutions to your most pressing problems and to assist you to seize opportunities as they arise in your organization and region.

So, if you have questions about how to begin to change and grow your business, or if a particular challenge is holding you back, please contact Steve Katsurinis at UCP National (skatsurinis@ucp.org). If you are considering engaging an outside consultant, please let us provide you a proposal. We may save you money, and we guarantee we'll bring you experts who can help.

