



GIVE.

ADVOCATE.

VOLUNTEER.

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UNITED WAY OF SOUTH SARASOTA COUNTY

Volunteer Information Form

Name: _____ Date: _____

Address: _____

City: _____ Zip: _____

Home Phone: (____) _____ Cell Phone: (____) _____

Other: (____) _____ Email Address: _____

Birth Month & Day: _____

Do you live here year-round? Yes No

If No, from month to month _____

Do you have any medical conditions, limitations, allergies or fears?

Emergency Contact Name: _____

Phone Number: _____

How did you hear about United Way South Sarasota County? _____

Why are you interested in becoming a volunteer? _____

Is this for school-required community service? Yes _____ No _____ If yes list the school: _____

As a volunteer for United Way South Sarasota County, I agree to abide by the policies and procedures. I understand I will be volunteering at my own risk. UWSSC, its employees or affiliates, do not assume any responsibility or liability for any accident, injury, or health problems which may arise from any volunteer work I perform. As an UWSSC volunteer, I agree that all work I perform is on a voluntary basis and I am not eligible to receive any monetary payment or rewards. I agree that I am not volunteering as part of any court-appointed or teen court-appointed community service program. I fully understand and agree with the terms of this agreement.

I agree to abide by the code of ethics outlined in this packet.

Signature: _____ Date: _____

(Parent or Guardian signature if under 18 years of age) _____

***Our Programs & Volunteer coordinator is happy to walk you through the remaining pages, please just fill out at a minimum this first page and return to us! programs@uwssc.com or questions: 941.484.4811 x 103**



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AREAS OF INTEREST, SKILLS and BACKGROUND

I am a: ☐ Seasonal Floridian (List months of the year in FL) _____

☐ Full time Florida Resident

List other organizations you volunteer for and in what capacity:

Technology Comfort level (what is your comfort with technology on a scale of 1-10, 10 being the most confident)

☐ Word Documents ☐ Excel ☐ Using internet and online forms ☐ Database

List other skills and special qualifications (bookkeeping, accounting, communications, retired professional such as lawyer, teacher, etc.)

Please check the volunteer areas that interest you.

☐ Advocacy ☐ Mentorship ☐ Women's Empowerment ☐ Fundraising ☐ Outreach

☐ Event Planning ☐ Event Logistics (set up/ break down) ☐ Grant Writing

☐ Speaking Bureau

☐ VITA (Volunteer Income Tax Assistance) Program (see attached description)

☐ Volunteer Reviewer of Grant Applications for our Allocations Committee (see attached description)

Other: _____

Circle the day(s) and shift(s) available:

Monday: AM and/ or PM

Tuesday: AM and/ or PM

Wednesday: AM and/ or PM

Thursday: AM and/ or PM

Friday AM: and/ or PM

Saturday: AM and/ or PM

Sunday: AM and/ or PM



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___ VITA (Volunteer Tax Assistance). Program Volunteer Opportunities.

The IRS's Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs offer free basic tax return preparation to qualified individuals.

The VITA program has operated for over 50 years, offering free tax help to:

- People who generally make \$57,000 or less
- Persons with disabilities; and
- Limited English-speaking taxpayer who needs assistance in preparing their own tax returns.

In addition to VITA, the TCE program offers free tax help, particularly for those who are 60 years of age and older, specializing in questions about pensions and retirement-related issues unique to seniors.

___ Center greeter ___ Site coordinator ___ Tax preparation ___ Quality Reviewer

DESCRIPTION of these roles:

Greeter Screener: The Greeter/ Screener provides support to the VITA Site Coordinator and volunteer tax preparers by ensuring each taxpayer has the necessary information required to complete his/her return.

Site Coordinator: The Site Coordinator coordinates the tax site making sure that the site runs smoothly. He or she solves any problems as professionally as possible keeping in mind that the clients are the top priority.

Tax Preparer: The Tax prepare provides high-quality tax return preparation to taxpayers who qualify for VITA assistance. Enter tax information into the TaxSlayer software. Obtain signatures for E-File authorization. Answer questions and/or use available resources to assist taxpayers

Quality Reviewer: The Quality Reviewers review each tax return completed by a volunteer, correct errors, and provide substantive tax knowledge and guidance to volunteers. The Quality Reviewer also assists the Site Coordinator in ensuring the efficient operation of the tax site

___ Allocations Reviewer:

Community Impact/ Allocations committee

Our Board of Directors and staff considers this process to be one of our most important community functions and values, because it demonstrates our community commitment to safeguarding our investments of your wonderful donations.

Every year we thoroughly "vet" each agency who applies for program funding for that programs' financial stability and community impact. Our funds are raised within South County and thus stay in South County for the most pressing recognized needs. That is why it is our policy to involve those who live here in South Sarasota County as advocates, donors and volunteers.

Community Impact Facts 2020



EDUCATIONAL PROGRAMS – GAVE 13,536 RESIDENTS:

The opportunity to attend preschool, after school care programs and summer programs so that parents may continue to work knowing their children are safe, get homework help, and make friends for a sense of belonging and community.

A chance to participate in day programs with focus and purpose, to get literacy help, respite services and clinical supports. A chance to begin generating lasting solutions from isolation, to develop lifelong strategies for a better opportunities in life.

HEALTH PROGRAMS - ALLOWED 40,925 CITIZENS:

To get needed food, hygiene products, medicine, counseling and access to health and dental clinics, when they may not have been not afforded. Allowing them to flourish by promoting less risky behaviors and healthier lifestyles.

To help support and protect abused and neglected children. To assist our frail seniors in need who are home bound or unable to cook themselves. To close the ranks on isolation, abuse and scam artistry that exploits our at-risk our neighbors.

To assess information and referral hot lines that connect citizens with area resources that can improve their quality of life. Our community thrives when all of our neighbors have access to updated resources that can lead them to a better quality of life and affordable care.

To have access to necessary psychological, health and personal safety assessments. Special needs adults and children so gained access to special training along with mentoring programs that improved, strengthened and empowered their lives for the better increasing their opportunities to thrive and succeed with less stigma.

FINANCIAL STABILITY PROGRAMS – ASSISTED 3,774 INDIVIDUALS:

With legal advice, foreclosure help, scam alerts, free tax assistance and social services resources which improved their financial stability and independence with programs that stimulated their financial futures. We accomplished this with the help of our robust funded program partners.

In accessomg program aids and client service referrals that gave a hand up during a short term crisis or natural disaster, which allowed them the time to establish a better plan. We connected individuals in connecting with a social service specialist helping lead them to utility resolutions and other helpful financial resources, preventing them from becoming homeless.

58,235 lives were impacted by investing in Venice, Osprey, Laurel, Nokomis, Englewood and North Port Communities.



UWSSC primarily focuses on funding programs that support the **ALICE** population within three core areas:
Health, Education and Financial Stability.

Funds Raised Stay In: Osprey, Laurel, Nokomis, Venice, Englewood, and North Port

23 NONPROFITS SUPPORTED
28 HUMAN SERVICES PROGRAMS FUNDED

COMMUNITY IMPACT GRANTS 2020-2021

Big Brothers Big Sisters Mentoring Program
CORE VALUE: EDUCATION

Boys & Girls Clubs Scholarships - South County Club
CORE VALUE: EDUCATION

CHAPS - Food & Hygiene Pantry
CORE VALUE: HEALTH

Child Protection Center
CPC/Therapy Program, Supervised Visitation,
Child Protection Team/Neglect Evaluations,
Personal Safety & Community Awareness
CORE VALUE: HEALTH

HEAD START -
Children First - Early Headstart South County
CORE VALUE: EDUCATION

Epilepsy Services -
Medical Services & Case Management
CORE VALUE: HEALTH

The Family Network on Disabilities
Respite Services and Children with Disabilities
CORE VALUE: HEALTH

Family Promise - Bridge Housing, Open Doors
CORE VALUE: INCOME & FINANCIAL

Florida Center - Early Intervention Services,
Healthy Families Sarasota,
Infant, Young Child & Family Counseling
CORE VALUE: EDUCATION

Girl Scouts - Scholarships
CORE VALUE: EDUCATION

Good Samaritan
Med Walk in Clinic & Dispensary

Gulfcoast Legal - Sr. Citizens Law Program
CORE VALUE: INCOME & FINANCIAL

Literacy Volunteers - Adult Literacy
CORE VALUE: EDUCATION

Loveland Center - North Port Adult Day Training
CORE VALUE: HEALTH

North Port Meals on Wheels
CORE VALUE: HEALTH

Salvation Army - After School & Summer Camp
CORE VALUE: EDUCATION

Senior Friendship Center -
Friendship at Home/Crisis Intervention
CORE VALUE: INCOME & FINANCIAL

SPARCC - Emergency Shelter
CORE VALUE: HEALTH

Teen Court - Wrap Around Services
CORE VALUE: EDUCATION

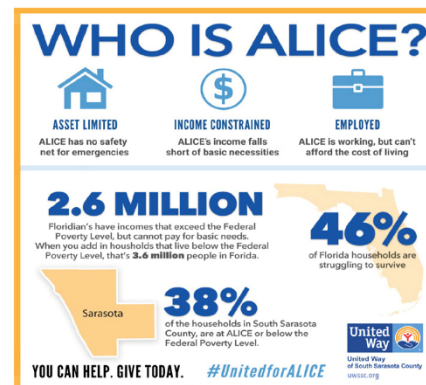
Venice Area Mobile Meals
CORE VALUE: HEALTH

YMCA - Englewood Youth Enrichment
CORE VALUE: EDUCATION

YMCA - Venice YMCA & PGT
Early Learning Centers

**BECAUSE OF YOU
THERE IS A WAY**

United Way
South Sarasota County



#EssentialALICE

YOU DO KNOW ALICE

Diana works 2 jobs, she goes to school part-time in hopes of obtaining a higher-wage job, to give her daughter a chance at a better life. A single mother, she is ALICE.

ALICE stands for Asset Limited, Income Constrained, Employed. ALICE can be an office worker, a personal care aid or nursing assistant, a childcare worker or an elementary teacher, a retail associate or custodian, even your delivery man. They are our friends, family and neighbors who go to work every day, but struggle to meet their basic costs of living: Housing, transportation, healthcare and childcare.

ALICE is one emergency, car repair or doctor visit from poverty.

YOU CAN HELP. GIVE TODAY. #UnitedforALICE

#EssentialALICE

YOU DO KNOW ALICE

James and Elise are new parents who dream of a better life for themselves and their daughter. James is a security guard and Elise works retail. They earn just enough to be above the poverty threshold, which means that they don't receive any government assistance, and they need it to help with basic needs. They are ALICE.

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YOU CAN HELP. GIVE TODAY. #UnitedforALICE

#EssentialALICE

YOU DO KNOW ALICE

Robert is a 14 year veteran with the local Fire Department. He has a wife and 2 sons, and lives pay check to pay check, just keeping his head above water. Robert is a good example of ALICE.

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Volunteer Conflict of Interest Policy

The Standard of behavior the United Way of South Sarasota County (UWSSC) is that all staff, volunteers, and board members scrupulously avoid conflicts of interest between the interests of the UWSSC on one hand, and personal, professional, and business interest on the other. This Includes avoiding potential and actual conflicts of interest, as well as perceptions of conflicts of interest.

I understand that the purposes of this policy are to protect the integrity of UWSSC's decision- making process, to enable our constituencies to have confidence in our integrity, and tom protect the integrity and reputations of volunteers, staff, a and board members. Upon or before engaging as a volunteer for UWSSC I will make a full, written disclosure of interests, relationships, and holdings that could potentially result in a conflict of interest. This written disclosure will be kept on file and I will update it as appropriate.

In the course of meetings or activities, I will disclose any interests in a transaction or decision where I (including my business or other nonprofit affiliations), family, and/or my significant other, employer, or close associates will receive a benefit or gain. After disclosure, I understand that I may not be allowed to continue my participation in certain meetings or activities where a conflict of interest may exist.

I understand that this policy is meant to supplement good judgement, and I will respect its spirit as well as its wording.

Volunteer Printed Name: _____

Volunteer Signature: _____



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UWSSC Volunteer Member Agreement & Statement of Expectations

Mission

United Way of South Sarasota County improves lives by mobilizing the caring power of the collective communities of: Venice, Englewood, North Port, Laurel, Nokomis, and Osprey to fund local programs that help fight for healthcare, education, and financial stability for members of our community.

Vision

A community united where all residents have equal opportunities for success.

Values

Values are the fundamental beliefs that help guide our organization.

Integrity

With transparency our actions will always support our mission.

Stewardship

The careful and responsible management of donor funds, volunteer time, and resources.

Diversity, Equity & Inclusion

Making diversity, equity, and inclusion central to our mission, increases philanthropy and has greater impact.

Innovation

Continual development of creative strategies that will adapt to the changing needs of our community.

Collaborations

Applying trust, respect, willingness, empowerment, and effective communication in building relationships with our community partner and business community to make a greater impact.

As a United Way South Sarasota County volunteer, I agree to uphold the mission, vision, and

United Way of South Sarasota County Mission, Vision and Values. I agree to comply fully with the standards, policies, and procedures contained in this manual.

I agree to:

- Become familiar with the above mission, vision, and values of our organization.
- Commit time, thought and effort to UWSSC.
- If inspired, make an annual financial contribution according to personal means.
- Participate in UWSSC fundraising activities in a variety of ways.
- Inspire friends/associates who might be prospective donors, board members, or committee members.
- Represent UWSSC to the community.
- If inspired, invite UWSSC staff to speak at group meetings you attend - religious, professional associations, and/or services groups.
- Avoid conflict of interest. (See conflict of interest packet.

NAME: _____ SIGNATURE: _____ DATE: _____



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Dear New South Sarasota County Volunteer,

I am so pleased and proud to have you come on board with us in this exciting year of expansion!

We mobilize the caring power of the community by leading with a growth mindset, modeling diversity, equity, and inclusion, understanding the communities we serve and engaging that community with relevant issues.

We endeavor each day to deliver awesome experiences and to engage and strengthen channels year-round. We offer the best-in-class fundraising, digital experience and volunteer opportunities, and are excited to leverage our people process and technology to accomplish our mission!

We look forward to you getting to know our staff team talent and family of volunteers and look forward to you enjoying using your existing talents and skills sets to help us assist those in greatest need in our community!



A handwritten signature in black ink that reads "Barbara Cruz".

Barbara Cruz, President & CEO

United Way South Sarasota County

157 Havana Road, Venice, FL 34292

Office: 941-484-4811, Cell: 941-525-4061

Barbara@uwssc.com www.uwssc.org



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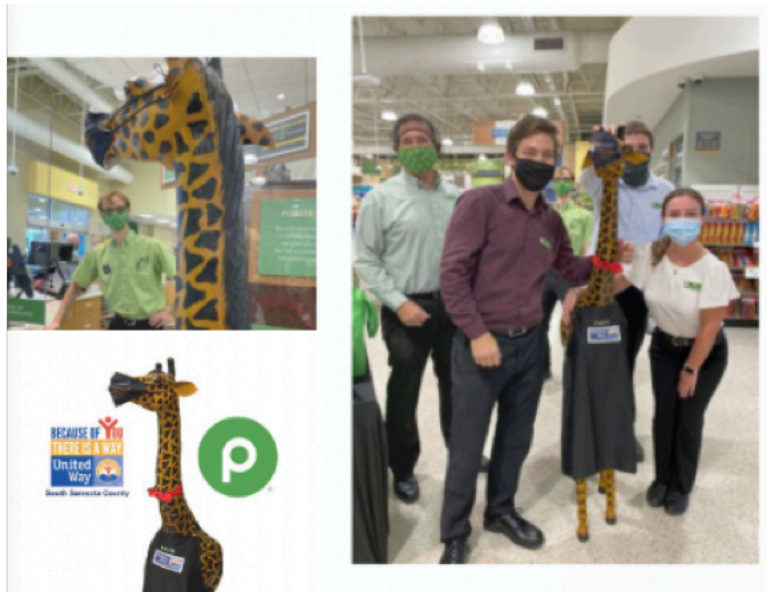
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Dear Volunteer,

I am Gallagher, the official United Way mascot, who helps bring attention and excitement to our United Way campaigns and events!



I am named after our United Way Worldwide President & CEO, Brian Gallagher.

I endeavor to get a photo at some point with all our new volunteers, and my booking & publicity agent, Erin Lilly, Public Relations & Resource Development Director here at United Way needs to know when you will be at our event or at your volunteer location. Please touch base with her and introduce yourself, so she may schedule a photo of you with me.

Erin Lilly - 941.525.4128 cell/text development@uwssc.com

In the service of our community,



Gallagher

United Way South Sarasota County Official Mascot