



United Way of the Ozarks

Receptionist Manual

Revised April 2020

CONTACT INFORMATION

Address: United Way of the Ozarks
320 N. Jefferson Ave.
Springfield, MO 65806

Phone: 417-863-7700

Fax: 417-863-9102

Your email: receptionist@uwozarks.com

This email is shared with all front desk staff and is for UWO business only.

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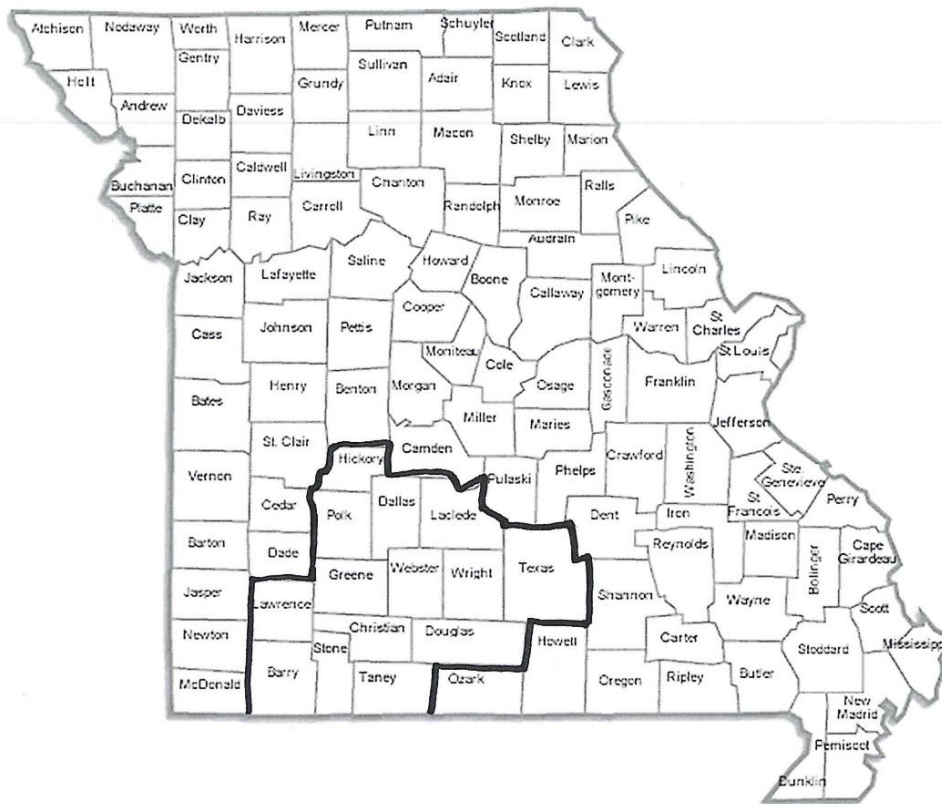
WHAT IS UNITED WAY OF THE OZARKS?

The mission of United Way of the Ozarks (UWO) is to improve lives by raising funds and uniting support around our communities' critical needs and red flags. We incorporate our values of accountability, collaboration, compassion, leadership, integrity, and impact into every aspect of our work.

UWO is committed to ensuring children are fully prepared to succeed in school and life and that adults can support themselves and their families. We invest in programs that form a SAFETY NET for families experiencing challenges and focus on EDUCATION to get upstream on reducing poverty. We connect communities, people, and hope.

Please visit the UWO website to learn more: uwozarks.com. You can also read through the campaign collateral materials, including the most recent annual report, brochure, and bookmark.

United Way of the Ozarks' Service Area:



United Way of the Ozarks serves 14 counties: BARRY, CHRISTIAN, DALLAS, DOUGLAS, GREENE, HICKORY, LACLEDE, LAWRENCE, POLK, STONE, TANEY, TEXAS, WEBSTER, WRIGHT

UWO RECEPTIONIST POSITION

This manual contains hyperlinks. They appear as underlined text throughout the document. Hovering over a hyperlink brings up a popup with instructions on how to follow it. You will find hyperlinks to several directories, which are included as appendixes. Additionally, the bottom of each page contains a hyperlink back to the Table of Contents. Every heading in the Table of Contents is also hyperlinked so you can access information quickly.

The Reception Desk Volunteer reports to the Director of Administration, Cindy Beecher, and is responsible for assisting UWO staff at the main reception desk with administrative tasks as needed.

RECEPTION

Greet all visitors in a welcoming and professional manner consistent with the United Way of the Ozarks' mission.

Possess knowledge of UWO [staff contact information](#) to direct visitors to the appropriate person.

Assist Campaign and Financial staff with Pledge Form tasks.

Complete filing, copying, mass mailing, and envelope stuffing as needed.

Answer incoming calls in a manner consistent with the UWO mission. Give callers information on resources and route calls to the appropriate staff.

Complete tasks for opening and closing the office.

COMMUNITY OUTREACH

Maintain general knowledge of the [211 database](#) to assist visitors and callers.

UWO TEAM

Be hospitable to all visitors, volunteers, and staff, treating them with dignity and respect.

Possess a working knowledge of all services provided by UWO.

Participate in meetings and trainings as requested.

Receive direction from and work under the supervision of the Director of Administration.

Work independently and in the absence of the Director of Administration.

Communicate with the Director of Administration when you are not able to volunteer.

REQUIRED QUALIFICATIONS & SKILLS

Experience with reception, customer service, or similar work, preferably in a nonprofit or volunteer environment.

Polite and friendly phone etiquette.

Detail oriented and committed to customer service.

Ability to follow oral and written directions, work independently and proactively, listen attentively, and clearly communicate orally and in writing.

Competent at interacting with a culturally diverse population.

Possess legible handwriting.

Flexible attitude toward the needs of staff, volunteers, and visitors.

Ability to hear and see activities in the reception area.

Computer, data entry, phone system, and typing skills are preferred.

RECEPTIONIST RESPONSIBILITIES

PROJECT REQUESTS

A UWO staff member must complete a Project Request form when they ask you to work on a project. The form is on the company server at [\\14-UWO-AD1\Company\Receptionist](#). If you have questions, please ask the person who assigned the project to you.

Once a project is complete, file the Project Request form in the white binder on the front desk so you can keep track of your work history. These forms were created to protect the receptionist's time from being pulled in many directions by different staff members and to review project progress.

WEEKLY CHECK-IN WITH THE DIRECTOR OF ADMINISTRATION

Each week, all receptionists and the Director of Administration will meet for about 30 minutes to discuss the past week's projects and review any upcoming work. Receptionists oversee creating the agenda for this meeting. This is a great time to ask questions, request time off, and get to know the other receptionists and the Director of Administration.

TIMESHEETS FOR AARP

Keep track of your hours each day. Every two weeks, fill out the timesheet that is faxed from AARP to the Director of Administration. Always submit your actual time worked, not the time you were scheduled to be here. The Director of Administration will fax the timesheets to AARP and give you a copy for your records.

Timesheet Submission Procedure

1. After completing your timesheet and having it signed by the receptionist and your supervisor, scan the timesheet through the main copier to the *Receptionist* file. There are instructions on the copier for how to scan to your user folder.
2. After scanning, go to your computer and open your scan file, located here: [\\14-UWO-AD1\Company\Scans\Receptionist](#).
3. Open your timesheet (the file that you just scanned).

4. Click *File > Print* and select *Upload New Fax* as the printer.
5. Click *Print*. A dialogue box will pop up. Enter the fax number for SCSEP (listed on the timesheet).
6. Click *Send*. A dialogue box will pop up saying “fax uploaded successfully.”
7. You’re done!
8. If an incorrect fax is sent, it will go to Adele Alton’s computer in Human Resources and she will let you know so you can resend it.

OPENING PROCEDURES

1. Turn on all lights (kitchen, bathroom, main lobby, and office area, but not personal offices).
2. Make coffee.
3. Check voicemail on the front desk phone:
 - a. To access, you will press *General Mailbox* and listen to the prompts. As you listen to the messages, record the following information:
 - caller’s name
 - caller’s phone number
 - date and time of call
 - caller’s message or question
 - b. When finished listening to all messages, either route them to the appropriate staff or call back the person who left the message and speak to them about their request. Some staff have specific instructions for receiving messages, although Slack (an instant messaging program) is usually the preferred way to convey messages. Visit slackdemo.com to see how Slack can be used. Ask the Director of Administration if you have questions.
4. Open Outlook on the computer:
 - a. Check emails from the previous afternoon and see if any information has been entered that you need to remember.
 - b. Check the UWO Shared Calendar to see if there are any scheduled events in our meeting rooms for the day.
5. Open Slack on the computer. UWO uses Slack for internal communication purposes; we rarely use email to communicate with someone in the office.
6. Empty the dishwasher if it is clean. Load dishes into the dishwasher if there are any in the sink.

CLOSING PROCEDURES

1. Organize the reception desk and put away any materials you used that day so the desk is clean and ready for the morning receptionist.

2. Close all programs on the computer.
3. Put the computer to “sleep” to save energy overnight. Click the bottom left Windows icon, then the Power icon, and then click *Sleep*.
4. Turn off all lights and fans:
 - a. front light (on the wall closest to the bathroom hallway)
 - b. both bathrooms
 - c. bathroom hallway
 - d. boardroom
 - e. kitchen
 - f. auditorium
 - g. storage closet
5. Turn off the coffee pot in the kitchen.
6. Lock all doors and turn on the alarm as you exit.

RECEIVING PHONE CALLS

It is important that you understand how to answer incoming calls and carry on a professional conversation over the phone.

When answering the phone, please say:

“Thank you for calling United Way of the Ozarks. This is ____ (name) _____. How may I help you?”

1. Put a caller on hold by pressing the red *Hold* button on the phone.
2. To transfer a call, press the *Transfer* button.
3. Press the correct extension shortcut or enter the extension number.
4. When finished, hang up.

For a Staff Directory, go to [Appendix A](#).

TAKING MESSAGES

When taking messages for staff, make sure you listen carefully to the caller. To be sure you have the message correct, repeat the message back to the caller. After the call, send the message through Slack or email.

Record the following information when taking messages:

1. caller’s name
2. caller’s phone number
3. date and time of call
4. caller’s message or question

For information on directing calls to the 211 Help Center, see [Appendix C](#).

GREETING VISITORS

Ask the visitor for their name and the purpose of their visit.

If they want to speak with a specific staff member, ask them to please take a seat and tell them the staff member will be with them shortly. Then use Slack, call, or walk to the staff member's office to let them know they have a visitor. If possible, do not let visitors walk through the office without a staff member.

For vendors with packages, you will sign for delivery and take the package to the appropriate recipient.

For walk-ins, direct them to One Door (300 E. Central St., 417-225-7499) if they are looking for housing or bus passes. If they need to talk with our Help Center, dial 211 from the switchboard and let them talk to a call-center representative.

Some visitors may need services that we or our partner organizations provide. We occasionally have a visitor who may be in an emotional or physical condition that causes concern for their welfare and ours.

To Help Us All Stay Safe

When someone approaches the front desk asking for assistance from an agency, whoever greets that person should pick up a UWO brochure and say something like "Let me get someone to help you." This is a way to have two people present during the interaction.

Front desk personnel should then give the best resource we have for that specific need.

Front desk personnel should call the number to that resource and give the phone to the visitor. *We no longer allow visitors in our kitchen to make phone calls.*

If we do not have a resource, apologize and send them on.

If the interaction becomes confrontational, lock the front doors and call 911. If necessary, use the pager to alert the other employees immediately. If the President/CEO is not in the building, immediately call or text their cell phone: Greg Burris, 417-839-3735.

Additionally, people sometimes sit at our picnic table out back. When you leave the building, please approach the back door and look toward the table before you exit to see if anyone is there. You may prefer to exit from the front door. If you are ever concerned with what you see, please get someone to go outside with you OR call 911 if necessary.

OPENING AND DISTRIBUTING MAIL

Checks. These will often be addressed to Accounts Payable. Remove checks from their envelopes, but do NOT date-stamp them. Give the checks directly to the Financial Assistant. Do NOT place checks into mail slots.

Do NOT open the following types of mail:

Bank Statements. Date-stamp the envelopes, then give them to the President/CEO, Greg Burris. Bank statements come from:

- U.S. Bank (c/o Emergency Assistance Fund and c/o CFC)
- Guaranty Bank
- Central Trust and Investments

Marked "Personal and Confidential." Date-stamp the envelope and distribute it to the recipient.

Addressed to Adele Alton or Human Resources. This includes mail from:

- Aetna
- Cox
- Mercy
- Principle Financial Group

Date-stamp the envelope and distribute to Adele Alton in Human Resources.

Addressed to a Past President/CEO. This also includes mail addressed to:

- Cindy Howell
- Jennifer Kenally
- John Rush

Mail addressed to a specific employee. Date-stamp the envelope and place the mail into the correct staff mailbox, located near the copy machine.

Open all other mail:

Addressed to Accounts Payable. These include:

- Checks (do NOT date-stamp these)
- Billing statements from Lowes, Office Depot, and Price Cutter
- Credit card statements and credit card bills

Date-stamp the billing and credit card statements, then distribute them to the Accountant, Kim Simpson.

Vendor Invoices. These will be from organizations such as:

- All Comm
- All Commercial Mowing
- Atlas Security
- Chamber of Commerce
- City Utilities
- Corporate Business Systems
- Springfield Business Journal

Date-stamp the invoices, then distribute them to the Director of Administration, Cindy Beecher.

Bank Statements and Anything United Way. Date-stamp the enclosed documents, then distribute them to the President/CEO, Greg Burris.

Other Mail Duties

- Stuff letters into appropriate envelopes and prepare them for mailing.
- Prepare trays for bulk mailings when needed (sorted by zip code).
- Print postage labels and address envelopes when needed.
- Put postage on letters if there are not enough (200+) letters to do a bulk mailing.
- Correct any designated and undesignated thank-you letters.

UWO POLICIES & GUIDELINES

NONDISCRIMINATION

UWO is committed to a policy of nondiscrimination based on race, color, sex, national origin, gender, sexual orientation, age, religion, marital status, disability, veteran status, or other criteria as protected by law.

CONDUCT

UWO believes that certain rules and regulations regarding volunteer behavior are necessary for the efficient operation of the UWO and affiliated organizations, as well as for the safety of all volunteers. Conduct that interferes with the operations of the organizations, discredits the organizations, or is offensive to staff, visitors, or fellow volunteers will not be tolerated.

Volunteers must always conduct themselves in a positive manner to promote the best interests of the organizations. Such conduct includes but is not limited to:

- Adhering to the organizations' Code of Ethics;
- Adhering to the policy on Conflict of Interest;
- Reporting to work punctually as scheduled and being at the proper workstation, ready to work, at the assigned starting time;
- Giving proper notice to your supervisor when you are unable to work or when you will be more than 10 minutes late;
- Complying with all safety and security regulations (refer to the UWO Policy on Workplace Security);
- Smoking only at times and in places not prohibited by organization rules or local ordinances (see [Smoke-Free Workplace](#));
- Treating all fellow volunteers, visitors, and staff in a courteous manner;
- Reporting to management any suspicious, unethical, or illegal conduct by fellow volunteers, visitors, staff, or suppliers;
- Cooperating in keeping the premises clean and safe;
- Following established safety practices, reporting all job-related accidents promptly to the appropriate supervisor, and submitting a Report of Injury form;
- Observing established organizational channels of communication;

- Maintaining a positive attitude and addressing all human relations problems with patience, tact, and diplomacy;
- Avoiding the promotion of discord among fellow volunteers;
- Avoiding gossip and rumors;
- Honoring the confidentiality of files, records, and documents;
- Limiting the number and frequency of personal activities at work, including guests, telephone calls, emails, texts, computer use, and conversations;
- Notifying your supervisor about any gifts received from vendors or member agencies;
- Committing to never obligate the corporation unless specifically directed by the President/CEO to do so.

INCLEMENT WEATHER

The UWO office will be closed if Springfield Public Schools are closed, or if the President/CEO chooses to close the office.

PERSONAL USE OF ORGANIZATION PROPERTY

Occasionally, volunteers may wish to utilize property of the organization for projects other than company business. Volunteers should clear this use in advance with the President/CEO.

Volunteers authorized to take property out of the office for personal use are responsible for its safe and timely return. Any damage or loss will be recovered from the volunteer.

TELEPHONE & COMPUTER USE

Volunteers should limit their personal use of the telephone and computer during office hours to only what is necessary. If you have any questions about taking care of personal matters while at work, talk to your supervisor.

COMPUTER & INTERNET POLICY

Computers and internet serve as tools for volunteers to accomplish work-related tasks. All computer information, voicemail, and electronic messages are considered company records. UWO has the right to monitor and inspect all computer systems, including hard drives, history files, and log files, for any reason and at its discretion.

UWO will access and share any required information on its computers if subpoenaed by a court of law. Understand that files can never be completely deleted from the computer system.

Personal use of UWO computers must not adversely affect volunteer work responsibilities and must not be disruptive or offensive to fellow volunteers or staff.

Harassment of any kind is prohibited. Do not transmit messages with derogatory or inflammatory remarks about an individual's or group's race, religion, national origin, physical attributes, or sexual preference.

Personal use of computers, such as email, games, and internet searches, must not exceed a total of 15 minutes per day and must not incur costs to UWO.

Internet

Your access to the internet at work is a privilege, not a right. As such, use the internet primarily for work-related tasks. You may access the internet occasionally for personal reasons, as described above.

Because there are currently no restrictions placed on internet access, nor blocking of any sites by administration, volunteers must agree to an honor system regarding sites visited. Do not visit questionable sites, such as sexually explicit or sexually oriented materials, gambling sites, chat rooms, and the like.

The internet may not be used for personal gain or advancement of individual views. Solicitation of business unrelated to UWO or use of the internet for personal gain is strictly prohibited.

Questionable internet usage by a volunteer will be met with appropriate disciplinary action—including possible termination.

Email

Volunteers may be issued a company email address to be used primarily for work-related communications and occasionally for personal communications. Occasional personal use of company computers and email is permitted, but information and messages in these systems are treated the same as other business-related information and messages. UWO software and other confidential information shall not be sent via email. Contact lists shall only be sent via email with prior approval of the President/CEO.

The email system shall not be used to solicit for commercial ventures, religious or political causes, outside organizations, or other solicitations unrelated to the job.

The email system shall not be used to send or receive copyrighted materials, trade secrets, proprietary financial information, mailing lists, or similar materials without prior oral or written authorization by the volunteer's supervisor or the President/CEO.

Violations of this policy will be met with appropriate disciplinary action and possible termination.

DRESS CODE

This policy sets standards for acceptable work attire. Management staff will mentor volunteers to represent UWO in the most professional way possible.

Business professional attire is required when you are attending a meeting with donors or business representatives whose clothing is typically business professional.

Business Professional

For women:

- Suits or dresses
- Slacks with a blouse and jacket or vest
- Hose or tights are strongly recommended, but not required
- Dress shoes

For men:

- Suits
- Slacks with a dress shirt and jacket (with a tie, as appropriate)
- Dress shoes with socks

Business casual attire is permitted when you have no appointments with donors or business representatives whose clothing is typically business professional.

Business Casual

For women:

- Khaki, black, or colored slacks (no jeans, except on Fridays)
- Capri pants (mid-calf)
- Shirts or blouses, sweaters, UWO/CPO T-shirts, other T-shirts without writing
- Skirts or dresses (no jacket required)
- Casual shoes

For men:

- Khaki, black, or colored slacks (no jeans, except on Fridays)
- Casual shirts, golf/polo shirts, sweaters, turtlenecks, UWO/CPO T-shirts, other T-shirts without writing
- Casual shoes

Casual Friday/Jeans Day

If you desire, you may wear jeans on these days. Please note that:

- Jeans must be clean and neat.
- Casual shoes, clean sneakers, and sandals are allowed.
- Clean and neat jogging suits are acceptable.

With advance supervisor approval, jeans may be acceptable on days other than Friday for volunteers who work in neighborhoods, work in child care centers, or conduct cleanups.

Basic Workday Guidelines

- Practice appropriate behavior.
- Practice good personal hygiene, including clean hair, hands, fingernails, and toenails.
- Minimize or avoid the use of perfume, cologne, or body fragrance.

Basic Guidelines for Appropriate Attire

- No spaghetti straps, tank tops, low-cut or form-fitting tops, or pants. Avoid exposure of your undergarments, cleavage, midriff, navel, and tattoos as much as possible.
- No flip-flops, beach shoes, or worn-out sneakers.
- Jeans must be free from holes, fraying, and rips.
- Sweats are never permitted other than on staff workdays.

- No facial or body piercing is allowed except in the ears. Inappropriate piercings must be taken out or hidden from view.
- Tattoos must be hidden from view or, if visible, must be of appropriate content as determined by your supervisor.

SMOKE-FREE WORKPLACE

UWO is committed to promoting healthy lifestyles and a clean environment. Use of any kind of tobacco products is prohibited on all UWO owned or leased properties, buildings, and grounds surrounding the buildings.

HOLIDAYS

UWO will be closed on the following holidays:

- New Year's Day
- Martin Luther King Day
- Memorial Day
- Independence Day
- Labor Day
- Veterans Day
- Thanksgiving Day and the day after
- Christmas Day and the day after

APPENDIX A: STAFF DIRECTORY

Receptionist: receptionist@uwozarks.com, Ext. 220

Gatekeeper to the office, support for the entire UWO team, and coffee extraordinaire

Cindy Beecher, Director of Administration: cbeecher@uwozarks.org, Ext. 222

Receptionist supervisor; assistant to the President/CEO; administration of the board of directors, community investment, building operations, vendors, and the UWO initiative funds (Cancer Fund and Veterans Fund)

Management Team:

Greg Burris, President/CEO: gburris@uwozarks.org, Ext. 229

Main organizational contact; as Executive Director of Give 5, manages all aspects of Give 5 program and assists management team in execution of the strategic plan

Marti Cashel, VP of Finance/COO (Chief Operating Officer): <email>, Ext. 225

Financial reports, government and legal relations, and IT and other computer-related responsibilities

Jill Finney, VP of Communication & Volunteers: jfinney@uwozarks.com, Ext. 243

Media contact, social media, UWO collateral/paper materials/advertising, and Day of Caring coordinator

<name>, VP of Resource Development: <email>, Ext. 229

Financial development and fundraising, major UWO events

Adele Alton, Human Resources Specialist: aalton@uwozarks.com, Ext. 242

Human resources, payroll, timesheets, and vacation time

Rachael Montgomery, Director of Resource Development:

rmontgomery@uwozarks.com, Ext. 230

Fundraising, workplace campaign

Danielle Conti, Director of Resource Development: dconti@uwozarks.com, Ext. 224

Fundraising, workplace campaign

Rennie Diekemper, AFL-CIO Community Services Liaison: rdiekemper@uwozarks.com, Ext. 227

Labor engagement, Hands On for Seniors coordinator

Colleen Neill, 211 Resource Specialist and Speaker's Bureau Coordinator:

cneill@uwozarks.com, Ext. 233

211 specialist, nonprofit sector workplace campaign

APPENDIX B: AGENCY DIRECTORY

United Way of the Ozarks partners with the following 22 agencies throughout our service area:

<u>American Red Cross (Southern Missouri Chapter)</u>	417-832-9500
<u>Betty and Bobby Allison Ozarks Counseling Center</u>	417-869-9011
<u>Big Brothers Big Sisters of the Ozarks</u>	417-889-9136
<u>Boy Scouts of America, Ozark Trails Council</u>	417-883-1636
<u>Boys & Girls Clubs of Springfield</u>	417-862-9249
<u>Community Partnership of the Ozarks (CPO)</u>	417-888-2020
<u>Court Appointed Special Advocates (CASA)</u>	417-864-6202
<u>Developmental Center of the Ozarks (DCO)</u>	417-831-1545
<u>Girl Scouts of the Missouri Heartland (GSMH)</u>	417-862-0004
<u>Kids First</u>	417-523-1631
<u>Great Circle</u>	417-865-1646
<u>Habitat for Humanity</u>	417-829-4001
<u>Harmony House</u>	417-837-7700
<u>Lutheran Family and Children's Services</u>	417-862-1972
<u>National Alliance on Mental Illness (NAMI)</u>	417-864-7119
<u>OTC Middle College</u>	417-447-7500
<u>Ozarks Literacy Council</u>	417-616-0505
<u>Ozarks Regional YMCA</u>	417-862-8962
<u>RSVP Reading Buddies</u>	417-862-3595
<u>The Kitchen, Inc./Rare Breed</u>	417-865-6400
<u>The Salvation Army</u>	417-862-5509
<u>The Victim Center</u>	417-863-7273

APPENDIX C: 211 HELP CENTER

United Way 2-1-1 (211helps.org) is a help center funded by the United Way of Greater St. Louis. This is where we transfer all calls that are requesting assistance from a resource center, such as with food, utilities, or rent.

Before transferring a 211 call, let the caller know that if they get disconnected during the transfer, dialing 211 on their phone will get them to the call center. When they reach the call center, pressing option 5 will connect them to a live representative who can provide the names of businesses and organizations that can help them.

Basic Needs:

- Food pantry
- Shelters
- Rent assistance
- Utility assistance
- Mortgage assistance

Physical and Mental Health:

- Medicaid
- Medicare
- Prenatal care
- Crisis intervention
- Support groups
- Counseling
- Alcohol and drug rehabilitation

Job Programs:

- Educational and vocational training programs, including English and second-language classes
- Job training
- General Educational Development (GED) preparation
- Financial and transportation assistance

Support and Services for Those With Disabilities:

- Centers for independent living
- Adult day care
- Meals at home
- Respite care
- Home health care

- Transportation and recreation

Support for Children, Youth and Families:

- After-school programs
- Tutoring
- Mentorship programs
- Family resources centers
- Protective services
- Counseling
- Early childhood learning programs
- Child care referral centers
- Recreation

Volunteering:

- Volunteer centers
- Mentorship opportunities
- Locations to donate food, clothing, furniture, computers, and other items
- One-time, long-term, permanent, part-time, or group volunteering opportunities

TOP UNITED WAY SERVICES REQUESTED THROUGH 211

April 22, 2019 to April 20, 2020 (United Way, 2020)

Utilities	31.4%
Housing & shelter	30.8%
Food	6.5%
Clothing & household	6.4%
Health care	3.7%
Transportation assistance	3.2%
Employment & income	3.0%
Government & legal	2.8%
Disaster	1.8%
Mental health & addictions	1.6%
COVID-19	1.3%
Child care & parenting	<1%
Education	<1%
Other	6.9%
Total requests	241,655

BIBLIOGRAPHY

United Way. (2020, April). *2-1-1 counts*. Retrieved April 21, 2020, from <https://211mo.211counts.org/>