



**D. Dontae Latson**  
Director

A Word from the Director and Board Chair:  
"Change is not a convenience but rather a necessity for survival"

**Nathel Hailey**  
Board Chair



Change is essential in order to survive. With the continued demands for our services, coupled with the troubled state and local economies, our department has to reinvent how we deliver services. A few primary areas of focus will be tracking outcomes, to include but not limited to customer satisfaction, employee satisfaction, workflow and process improvement, and partnering with other human services agencies and the larger business community. Considering the increases in health care reform and the estimated 500,000 to 800,000 additional eligible residents in the state of North Carolina, we must be prepared to adjust how we provide services. "The greatest danger in times of turbulence is not the turbulence; it is to act with yesterday's logic." ~ Peter Drucker

Towards the end of the fiscal year, the executive team participated in a leadership retreat to address the ever-changing business needs and staff changes. The retreat established a renewed vision and five values which are briefly described below:

**UCDSS Vision:** A progressive "state of the art" social service organization which: provides a quality customer experience through the provision of superior service delivery, is a choice employer evidenced by employee satisfaction and ongoing professional development, demonstrates accountability and transparency from the Director's office to the front line; and has the resources necessary to effectively and efficiently conduct business

#### UCDSS Values:

- 1) **Team Work:** Working together to achieve the greater good.
- 2) **Connecting and Reconnecting by Aligning Self with Purpose:** Passion, timeliness, accuracy, internal systems, policies & procedures.
- 3) **Creativity Drives Ingenuity:** Building on our strengths through a process of collaborative exchange.
- 4) **Raising the Bar while Raising the Floor at the same time:** Continuously striving for excellence.
- 5) **Fiscal Responsibility:** Accountable stewardship of resources, through progressive internal controls, and personal responsibility.

A next step is to have a retreat for the entire leadership team to include supervisors, managers and the director. From this, an ongoing leadership development program will follow and will be required for all UCDSS leaders.

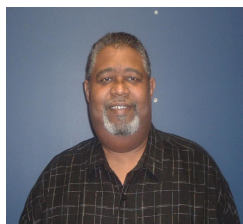


Last year's report introduced readers to a graphic with the words *Investment*, *Community* and *Prosperity* displayed within the globally recognized symbol for "recycling". This symbol, and these three important words, are a part of Union County Department of Social Services' (UCDSS) branding campaign and highlight the importance of investing and reinvesting in our residents and community. Human capital investments like the programs and services provided by UCDSS, ultimately makes Union County a preferred community in which to live, rear children, and conduct business. The types of investments managed by UCDSS involve federal, state and local resources that advance public well-being and returned to the community multiple times over. On average, for every tax dollar spent on public aid programs, \$1.05 is reinvested in our community.



### TABLE OF CONTENTS

How does the UCDSS budget affect me?.....	3
Where does the money come from?.....	4
Impact on Families.....	4
Focus Area: Families achieve economic well-being.....	5
Focus Area: Families achieve safety.....	8
Focus Area: Families achieve permanence.....	11
Supportive Services.....	13
Agency wide Accomplishments.....	15
A look to the future.....	17
Special Recognition & Acknowledgements.....	18



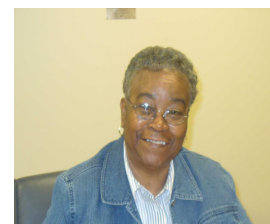
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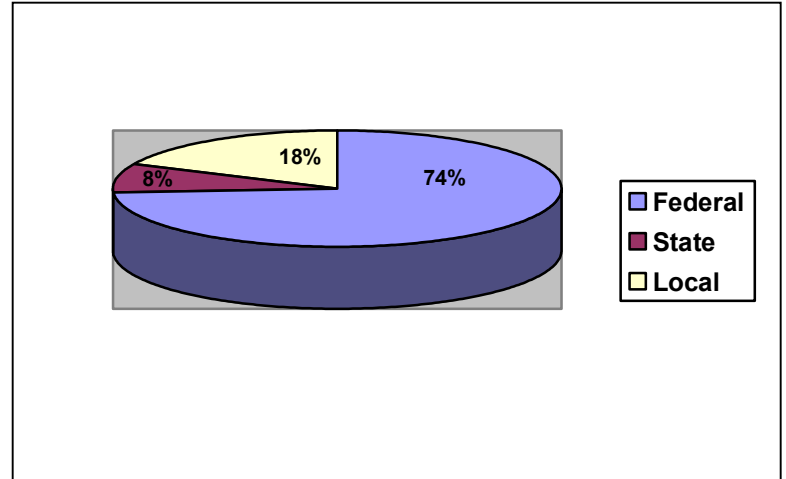
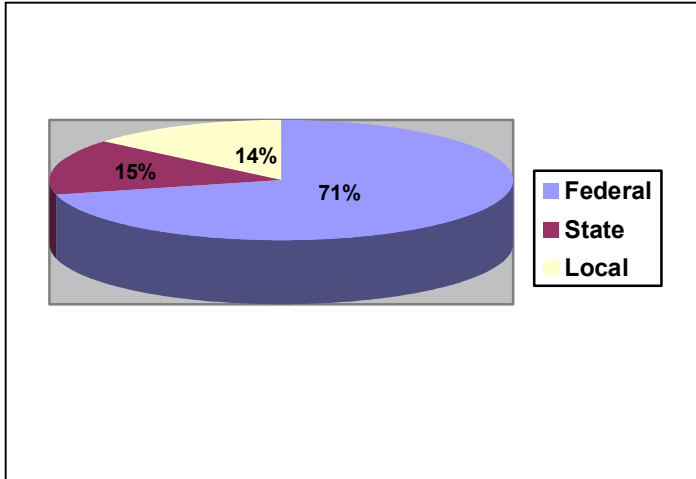


### HOW DOES THE UCDSS BUDGET AFFECT ME?

With the proposed local, state and federal expenditures of over \$52,867,652 in 2009/2010, there are few Union County residents not impacted by the work performed by UCDSS. Examples of programs and services affecting county residents include health insurance, rental assistance, and supports for vulnerable families. Below is a pie chart showing the major categories of revenue and program expenditures for this past fiscal year.

Revenue

Expenditures



#### *Impact of State Budget on Local Departments of Social Services:*

The 2010 Legislative “Short” Session ended on July 10, 2010 and Health and Human Services has been “hit hard”, losing significant funding and support for important programs and services. While in this time of severely limited resources, some believe it certainly could have been worse, county DSS agencies did loose some “footing” and funding that will have both an immediate and possibly long-term impact. Local departments of social services are impacted by funding and program cuts. Negative impacts to counties include:

- County DSS child welfare programs are now subject to a 16% recurring (permanent) reduction to child welfare funding. This funding has supported legislatively mandated child protective services caseload standards.
- Counties will pay an increased match payment (now 50%) for State-County Special Assistance at a cost to counties of nearly 3.4 million dollars.
- Counties will also now pay 25% of the non-federal share of state Adult Care Home Specialist funds (currently the county pays 10%) – these funds support monitoring and inspections of licensed adult care homes.
- TANF Emergency Contingency funds, initially earmarked for subsidized employment programs for 24 county DSS agencies, were realigned and reallocated for use in other programs and services (e.g., \$23.6 million was used to replace state funding for child care subsidy) resulting in these programs “shutting down” and terminating hundreds of local jobs in these affected counties.
- The budget contains a contingency plan should the \$519 million in enhanced federal Medicaid funding not be realized by January 1, 2011. By order of priority (first taken, last restored), the state budget director will use disaster relief funds, unclaimed lottery prize money and excess receipts realized in 2009-10, other funds’ interest, and the remaining General Fund availability. Next in line would be a reduction in Medicaid provider rates, use of some of the \$150 million in the rainy day reserves, a reduction in the state’s retirement contribution (\$139 million), and last but not least, a 1% across-the-board cut to state agencies (\$177.5 million)



## WHERE DOES THE MONEY COME FROM?

### *Social Services Consortium 2010 Legislative Agenda:*

We were able to secure 4 of 6 items from the North Carolina Association of County Directors of Social Services (NCACDSS) 2010 Legislative Agenda. Two items on our legislative agenda included language regarding streamlining childcare subsidy funding and state aid to counties. These items were not addressed this session; therefore, we will continue our advocacy efforts into the long session, which begins in January 2011.

Our legislative victories include:

- Maintaining Child Day Care Administration at 5%
- The Department of Health and Human Services (DHHS) can use over-realized receipts to expedite development of the NCFast case management system.
- In addition to these items, Health Choice funding increased thus enabling more children to be served.

More than 97% of UCDSS' budget is dedicated to mandated spending. Mandated programs are ones that are required by federal or state statute.

#### Program Area Expenses:

74% Public Assistance  
20% Services  
6% Daycare

The total budget of 52,867,652 is roughly 100,000 less this year than FY 08-09 (\$152,876,652) as Medicaid has changed to run through the State budget and routed through our local budget.

## IMPACT ON INVESTMENTS

### A Few Notable Cuts:

- The General Assembly enacted a Medicaid relief swap package in its 2007-2008 budget (House Bill 1473) to phase out the county share of Medicaid over three years, with the final components of the relief swap occurring in FY 2009-2010. Prior to Medicaid relief swap, the state required counties to pay 15% of the non-federal share, the last state requiring county financial participation in all Medicaid services.
- In order to be in compliance and meet the minimum specifications of Northwoods and the state's implementation of NC FAST, we have a two-year plan to replace all outdated computers.
- The state's budget cuts to the State Aid to Counties reduced funding during the fiscal year in the amount of \$79,236.
- Internally, we cut our travel and training expenses by approximately 25%.
- Our printing and office supply expenses were cut by 30%
- The General Assistance fund was cut by 95%



### FAMILIES ACHIEVE ECONOMIC WELL BEING:

#### *Family Economic Well-being Services at a Glance:*

Union County is responsible for providing services to address the economic well-being of individuals and families residing in the county. These include income assistance, medical services, services to vulnerable adults, food and nutrition services, and workforce preparation and readiness. Two divisions within the department provide services geared towards economic well-being: Adult Services & Benefits, and Family Support Services.

The Adult Services & Benefits division has undergone some significant changes this fiscal year- several leadership changes, major program changes, and huge increases in the number of clients requesting and needing assistance. A significant focus has been on being good stewards of county resources and maintaining quality customer service in the most challenging of times. Workloads, task distribution and work processes were implemented to increase efficiencies. Outreach to other human service agencies in order to streamline the client experience and coordinate resources has coincided with increased efforts to educate the public about UCDSS programs in order to help the community plan for their future as well as promoting public well-being and independence.



#### *Quick Facts:*

- Turning Point Women's Shelter provided assistance for 15 adults and 31 children with the support of \$25,746 in funding from the WorkFirst program. This funding will increase to \$33,060 for fiscal year 2010-2011.
- NC Dot provided \$53,157.00 to assist with work related transportation assistance for working individuals and families. These funds served 75 individuals for the year. This amount has increased to \$66,733.00 for 2010-11. Applicants must work 30 hours a week, and the funds they receive can support things like car insurance and repairs, bus passes, etc.
- At this time, in our economic history and as a direct result of losing their jobs, many families have also lost their health insurance coverage. The poor economy and high unemployment rates have forced many individuals to enroll in the Medicaid/NC Health Choice Program in order to access and afford health care for them and their families. Due to the acceleration of applications and rising caseloads, the Family & Children's Medicaid department quickly rose to the challenge including an increased focus on identifying and prioritizing opportunities to simplify internal processes. Additionally, enhanced time management practices resulted in a reduction in application processing time, which resulted in a positive impact to the customer experience.
- The Food & Nutrition Services (FNS) unit provided an average of 17,152 individuals per month with FNS benefits totaling \$28,267,289 for the fiscal year 2009-2010. This added 28 million federally funded dollars into the Union County economy thus supporting grocery stores, supermarkets, farmers, retailers, and various merchants who accept EBT transactions. Transportation companies & truck drivers who deliver food were also positively impacted by these funds coming into Union County.
- The Low Income Energy Assistance Program provided \$652,639 in state funds to assist 3,305 households with the rising cost of heating their homes.





### More Quick Facts:

#### Program Integrity:

- The two largest recouping public assistance programs in North Carolina are Food and Nutrition (Food Stamps) and Medicaid. In the State for 2009-2010 fiscal years, \$1,348,668 was recovered and collected in Food Stamps, and \$8,130,127 in Medicaid. In June, Union County was in the top three statewide for the month collecting \$9766 in Medicaid.
- At the end of the 2009-2010 year, three Investigators had a 1,305 Program Integrity caseload with 1,199 pending for investigation indicating a 9% increase from last year. In this fiscal year, 150 reports were generated from citizens calling the Agency Fraud Hotline in addition to referrals received from other stakeholders.

#### Medicaid:

- Title XIX of the Social Security Act is a federal and state health insurance entitlement program, known as Medicaid, which pays for medical assistance for parents, children, seniors, and people with disabilities who have low incomes and resources. Medicaid became law in 1965, at which time the federal and state governments jointly funded it. In 1969, the State of North Carolina received Medicaid State Plan approval, followed by implementation in 1970. In 1998, the Health Choice for Children program was implemented (health care coverage for children under age 19 who do not meet Medicaid income limits but fall below 200% of poverty. Depending on income, some families may be responsible for a premium payment.)
- Medicaid is the largest source of funding for medical and health-related services for America's poorest people. A more comprehensive description of Medicaid's historical highlights can be found at the Department of Medical Assistance (DMA) website: <http://www.ncdhhs.gov/dma/pub/historyofmedicaid.pdf>

#### WorkFirst:

- WorkFirst collaborated with Good Will Industries of the Southern Piedmont who will provide paid training slots for Work First participants. The paid training is for 90 days and can lead to full time employment.
- WorkFirst has a full time Employment Security Worker on site to assist participants with job search, resumes, job referrals and job search classes. There was an average of 106 mandatory participants per month for the year. Sixty-four of these participants were able to obtain employment, and an average of an additional of 198 non-mandatory Work First cases were processed each month.

#### **Accomplishments:**

Implemented a plan of action to process applications received from Social Security Administration in a more timely and efficient manner.

Merger of the FSN intake & redeterminations units to leverage expertise, which resulted in improved service delivery to customers.

Implemented automated data system for improved information sharing between caseworkers and supervisors for the purpose of enhanced productivity.

Timely and accurate processing of adult Medicaid cases (at a rate of 90% or better over the past year).

Provided the following services in collaboration with South Piedmont Community College:

- 496 adults with TABE testing (Test for Adult Basic Education) and 99 customers referred to continuing education classes such as C.N.A. I & II
- 1405 hours participated in on site Academic Support Lab, and 6905 student instructional hours were logged
- 181 customers referred to GED, ESOL or high school diploma classes
- 247 customers referred to vocational training classes, 255 customers referred for Career Readiness Certification, and 99 customers were referred for curriculum programs



**Challenges:**

Maintain quality control and program integrity goals with limited resources.

Ensure that services are culturally and linguistically competent, including meeting the needs of the growing number of Latino families that reside in the county. UCDSS currently has four staff providing interpretation services; this is a reduction from the prior year and is a challenge given the growing need for interpretation services.

**Goals:**

- 1) To continue to process our cases timely and accurately with a 66% increase in clients seen over the past year.
- 2) Continue to improve effectiveness by use of computer resources to enhance productivity with strategies like automated and targeted phone and/or text messaging, shared drive, and specialized data spreadsheets.
- 3) Ensure that there are no overdue cases for eligible households for expedited benefits.
- 4) Identify opportunity to streamline and maximize task distribution within the department's workforce.
- 5) Increase fraud collections by 10%, and heighten efforts to prevent fraud by leveraging the department's workforce towards this shared goal through quarterly staff trainings.
- 6) Increase public awareness through targeted social marketing strategies such as internal bulletins, County newsletter, and local media.

One Family's Struggle

One family's struggle mirrors those of many others who have felt the tremendous impact of a spiraling economy. A husband and wife with two young children entered our agency seeking the ability to secure medical care and other potential services to assist in their economic survival. The father had lost his job due to a layoff and the mother had been the stay at home caregiver for their pre-school children. One of many dedicated Medicaid caseworker's determined the entire family eligible for Medicaid and spent countless hours coaching and helping the family set up a budget plan including a strategy for lowering their monthly expenditures. Tips and advice was given on how to navigate Employment Security Commissions job search site. Referrals were suggested for South Piedmont Community Colleges displaced worker programs and United Family Services for family counseling. Other potential aid programs and services were identified and referrals made to augment the family's efforts to maintain their housing and purchase food. Due to the empathy and skill of our caseworkers, this family was able to avoid an economic crisis. The father is now gainfully employed, their finances are secure and bills are being paid timely and they were able to save their home.

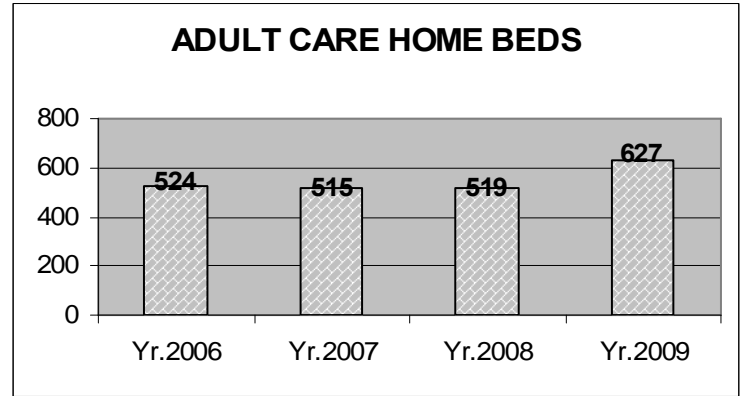
Dates	Intakes	Ongoing Caseload	# of individuals	Dollars Issues
07/2009	820	6608	14,072	2,060,277
08/2009	829	6784	14,586	2,137,898
09/2009	829	6957	15,039	2,208,701
10/2009	808	7158	15,409	2,291,046
11/2009	709	7279	15,956	2,345,660
12/2009	708	7379	16,177	2,401,622
01/2010	820	7627	18,538	2,396,769
02/2010	684	7746	18,810	2,437,700
03/2010	760	7859	19,080	2,458,520
04/2010	679	7929	19,157	2,469,282
05/2010	641	8050	19,386	2,515,978
06/2010	731	8159	19,612	2,543,836



### FAMILIES ACHIEVE SAFETY:

#### Family Safety Services at a Glance:

Union County is a mandated service in the areas of child and adult safety. This includes responding to issues of child abuse and neglect as well as adult protective issues. The type of services which fall within this priority area include responding to allegations of child abuse and neglect, ensuring availability of safe and quality child care options, and responding to allegations of adult abuse. Three divisions within the department provide services geared towards safety: Family & Children Services & Benefits, Adult Services & Benefits, and Family Support Services.



#### Quick Facts:

- The Adult Services Unit strives to provide efficient and effective service deliver to the disabled and/or elderly citizens of Union County. In addition to being dedicated to this population, we work with their family and/or caregivers to insure they are safe and appropriately cared for. This task will continue to be especially important due to the increase in this segment of our population. We are committed to the safety, care, quality of life, and the right to self-determination for the citizens we serve.
- UCDSS Subsidy Child Care Services funneled \$9,483,073 to our community childcare businesses supporting working families. During the 2009-2010 fiscal year children attended 116 different licensed facilities, and since February 1999, more Union County families and childcare businesses have received services because of the strong support from Union Smart Start, our local Partnership for Children. Through collaborative efforts, the UCDSS Smart Start Parent Counselor continues to provide families with educational information to assist with locating and choosing high quality childcare.
- In partnership with the Department of Health Services Regulation, the Adult Services unit was able to insure increased safety and improve the quality of care of residents in Adult Care Homes. This partnership resulted in 100% of the Adult Care Homes being developed and implemented to align with a Quality Improvement Plan (QIP). Eight of the 16 Adult Care Homes scored at least 100 on their annual state survey.
- Eighty-two percent of children served live in homes where one or both parents are employed, and 84% of these families who receive subsidy childcare earn less than \$25,000 a year. Parents pay a portion of childcare costs according to their family size paying 8%, 9%, and 10% of their gross income. Approximately 95,000 children in North Carolina receive subsidy services each month. These services allow families to pursue their employment and educational goals.
- Parents with stable quality childcare make for better tax paying employees, and children who attend quality childcare programs are more successful in school





### *Accomplishments:*

By accessing services, 17% of the adult wards were able to remain in their own home safely, in lieu of placement at an assisted living facility or nursing home. The conscientious work of the Adult Protective Services social workers resulted in 100% adherence to the state time requirements for initiation of Adult Protective Service referrals.

### Childcare accomplishments include:

- 2,471 children received subsidy childcare assistance
- 1,231 of these children were assisted by Union Smart Start funding
- 2,484 transportation trips completed through subsidy funding
- 207 average number of children transported monthly
- 3,270 contacts made by UCDSS Union Smart Start Parent Counselor
- 83 childcare site visits were completed
- 76% of children served in attended either a four or five-star program; 12% of children attended a three-star program

Achieved permanency for 39% of children entering foster care within one year. Fifty-five percent of adoptions were finalized, and the number of foster homes increased by 41%. The number of children in the foster care backlog was reduced by 17%.

Five youths involved in the LINKS independent living program enrolled in a four-year university or community college program.

The number of cases in the backlog for child protective services was reduced 100%, and the caseload volume was maintained at 10-20 families per caseworker.

### *Through the Eyes of a Father and his Child:*

Brandon Mason met his son Gabe for the first time on March 3, 2010 at the Department of Social Services when Gabe was six years old. Gabe came into the custody of Department of Social Services as a result dependency and neglect, because his mother could not care for him and was unable and unwilling to help in locating an alternative caretaker. The Department worked hard to locate Gabe's father in an effort to respect that value that children do best with their family.

When social workers found Mr. Mason, they learned that not only was he willing to accept responsibility for Gabe, he had been trying for years to meet his son. Mr. Mason defied all of the assumptions about fathers who are not active in the lives of their children. In fact, Mr. Mason had been providing financial support since he discovered that he was a father when Gabe was about 3 years old.

In a letter to UCDSS social workers, Mr. Mason said, "It's been hard to believe that I have had Gabe since March 3rd. He has brought such joy and filled a void where there was once a hole. I am most thankful for all of your efforts, support and love to my son. Words cannot express my appreciation for the love you have shown him during this time in his life. You will forever be in my thoughts and prayers. These past few months have been an emotional challenge, with great victories and some small setbacks. Gabe is now sporting a Mohawk for the summer and gets on to me when I don't spike it."

Brandon and Gabe remind us how important the work of UCDSS is and what we can do to make sure that every child deserve to get one more change in life.





### Challenges:

- Partner with the mental health system to leverage resources for UCDSS clients, with a specific goal to ensure appropriate placement of disabled and/or elderly individuals with persistent mental illness and destructive behaviors
- Continue to ensure quality care provided by adult homes that are experiencing an increase in clients with limited UCDSS resources to meet these needs.
- Increase resources to meet the needs of the Latino population by increasing bilingual workers at UCDSS.
- Modernize and streamline technology processes in order to reduce delays in intake, assessment and service planning.
- Funding to maintain Foster and Adoptive homes for adolescents and teenagers.
- Recruitment and retention of a qualified workforce to replace retirees.

### Goals:

- 1) Revise the Title XIX Medicaid no show policy to reduce the number of no shows by 10%
- 2) Secure additional transportation contracts to ensure adequate coverage for Title XIX (Medicaid) clients' trips.
- 3) Partner with Medicaid transportation clients to further educate them about the agency's policy on transportation in order to strengthen decision-making capacity in the use of this service.
- 4) Facilitate planning to meet the community's future need for adult services, and strengthen partnership with business partners and the community for increased ease of service utilization by clients
- 5) Improve unit effectiveness by use of computer resources to enhance productivity
- 6) Establish and/or fill mission critical positions; continue to maintain caseload ratios for child protection
- 7) Outreach to the community to increase awareness about needs of children and families, and increase the number of permanent homes for children requiring out-of-home placement
- 8) Reduce repeat maltreatment, the rate of recidivism for children entering foster care

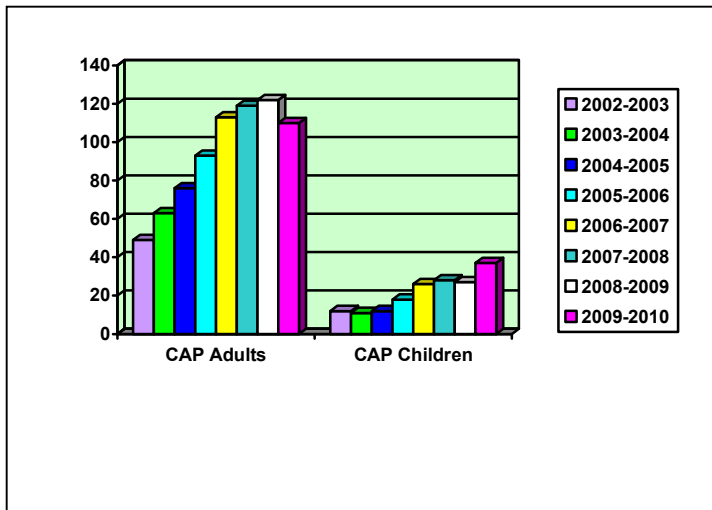




## FAMILIES ACHIEVE PERMANENCE:

*Family Permanence at a Glance:*

Union County is a mandated service in the areas of child and adult safety. This includes responding to issues of child abuse and neglect as well as adult protective issues. The type of services which fall within this priority area include responding to allegations of child abuse and neglect, ensuring availability of safe and quality child care options, and responding to allegations of adult abuse. Three divisions within the department provide services geared towards safety: Family & Children Services & Benefits, Adult Services & Benefits, and Family Support Services.



*CAP Clients Served By Year  
 Maintained a case management revenue of 98% as compared to 2008-2009 revenue, despite Medicaid cutbacks and staff limitations*

*Quick Facts:*

- Enabled 67 Union County citizens to maintain independence in their own home due to in-home aide services
- Successfully transitioned 68% of clients to contract service
- Networked with Council on Aging, Neighborhood Nurses, Centralina Council on Government, our business partners, for maximum use of resources
- Allows medically fragile adults and children to remain in the comfort of their own homes as an alternative to facility or hospital placement
- Allows family members to maintain their employment
- Provides employment for 150+ in-home aides and nurses
- Promotes employment for numerous professionals in related areas such as therapist, home health nurses, etc
- Supports many small businesses who directly employ in-home aides, nurses, and provide durable medical equipment
- Decreases the potential for protective services intervention due to the stressful demands of constant care giving
- Decreases the demand for other DSS services/ income maintenance programs (i.e. Food Stamps, Medicaid, other emergency services) as Union County citizens depend on this program for their employment
- On average, CAP is less expensive to Medicaid than facility care.
- CAP served 110 adults and 37 children during the 2009/2010 fiscal year while facing many challenges. Many limitations were placed on CAP by the Division of Medical Assistance, in the form of Medicaid cutbacks. Additionally, county cutbacks left the CAP unit without a formal supervisor during this entire year.



### *Challenges:*

Multiple cutbacks in Medicaid including a rate cut for case management reimbursement (October 2009), a freeze on Community Alternative Programming and Disabled Adults (CAP/DA) slots (October 2009), a reduction in CAP/DA slots (February 2010) and limits on the amount of case management that can be billed monthly (March 2010). These cutbacks results in an increased wait time for applicants seeking services due to the freeze on CAP/DA services.

Reduction in the number of Community Social Services Assistants (from six to two staff) which results in challenges meeting the growing service needs of the Union County community.

Increasing service needs as evidenced by the growing number of referrals for clients with protective service involvement.

### *Goals:*

- 1) Maximize the usage of the 88 CAP/DA slots we have available.
- 2) Serve as many children as the Division of Medical Assistance and case management staff availability, will allow.
- 3) Provide quality case management services as is evidenced by annual Client Satisfaction Surveys and program reviews.
- 4) To support informal caregivers, avoid premature placements, and avoid the need for protective service involvement.
- 5) Provide quality case management and in home aide services as is evidenced by annual Client Satisfaction Surveys and program reviews.
- 6) To network with our community partners to maximize resources and clients served.
- 7) To support informal caregivers, avoid premature placements, and avoid the need for protective service involvement.
- 8) Provide quality case management and in home aide services as is evidenced by annual Client Satisfaction Surveys and program reviews.
- 9) To network with our community partners to maximize resources and clients served.





### SUPPORTIVE SERVICES:

SUB-COMMITTEE STATUS UPDATE	All committees have been completed and will serve as standing committees moving forward.
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STAFF DEVELOPMENT	Hired new manager to lead this effort.
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INTERPRETER SERVICES	<p><i>Accomplishments:</i> The Interpreter unit workers have been able to provide language assistance to 5041 Limited English Proficient (LEP) customers. Continued compliance with State mandates in the provision of language assistance by trained interpreters.</p> <p><i>Challenges:</i> Maintaining excellent customer service with limited training resources for foreign language interpreters.</p> <p><i>Goals:</i> To have the interpreter staff take &amp; pass the written portion of The National Certification test for Professional Interpreters. Future goals will include the practical &amp; oral portions of this test</p>
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VOLUNTEER SERVICES	<p><i>Quick Facts:</i></p> <p>Volunteers from the community generously participate in projects and tasks throughout the agency, with the Union County Christmas Bureau, the USDA Commodity Distribution as well as provide volunteer transportation to elderly adults, disabled adults, and foster children.</p> <ul style="list-style-type: none"> <li>• Total 2009 Volunteers: 717</li> <li>• Total Hours of Service: 8,611</li> <li>• Total Value of volunteer Hours: \$168,001</li> </ul> <p>The Union County Christmas Bureau provides assistance to qualified applicants during the Christmas season and serves as a clearinghouse with other nonprofit agencies throughout Union County. The Marine Corps' Toys for Tots program provided new toys and gifts that were distributed to the children of the families. Church organizations and individuals assisted through donations as well as sponsoring families or children.</p> <ul style="list-style-type: none"> <li>• Total Volunteers: 378</li> <li>• Volunteer hours: 4,200</li> <li>• Value of volunteer hours: \$87,570</li> <li>• Monetary contributions: \$36,467</li> <li>• Households served: 2,074</li> <li>• Residents served: 8,277</li> </ul>
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### VOLUNTEER SERVICES

#### Quick Facts:

Preparing federal and state income tax returns can not only be a tedious task, but can be a costly one as well. Volunteers train with the Internal Revenue Service to become certified in preparing tax returns for taxpayers. The agency has provided this service at no cost to taxpayers since 2005 through the assistance of those dedicated volunteers.

Total Certified Tax Preparers: 9  
Total Taxpayers Served: 412  
Total Refunds Generated: \$388,981  
Total EITC Refunds: \$134,881

Volunteer, Janet Jenkins has been preparing income tax returns for taxpayers since the programs inception in 2005 through the Volunteer Income Tax Assistance Program with Union County DSS. She wanted to assist others to get their tax filing requirements completed and allow them to keep their entire refund. Janet volunteers because she “knows how stressful tax time can be and she wants to give back to others and help meet their needs and allow them to keep as much of the refund they are entitled to.”

Moving forward we plan to place a stronger emphasis on engaging the community. Volunteer services were instrumental in expanding our internship program to include disciplines beyond social work and human services. These internships included, but not limited to the following: Accounting, Marketing, Sociology, Organizational Science

### Help From the Community to Save Christmas

The Christmas Bureau of 2009 was struggling to receive donations and sponsorships and there as an opportunity to put the story in the media outlets. The Charlotte Observer ran a story about the Christmas Bureau and the need for community support to make this a successful Christmas. Norwood Poole, one of the owners of Dale Jarrett Ford, read the article and then threw it in the trash. As he walked away, he remembered the time when he was a child that his family did not have anything for Christmas. He realized those were the same types of families that were in the article he had just thrown away. As he retrieved the article from the trash, he also gathered his staff together to determine what they could do as a business to help those families in need. They determined to give \$50 in toys for every new car sold by their dealership to the Union County Christmas Bureau during November and December. The Dale Jarrett Foundation also made the decision to match all of their contributions with the same value in toys. On December 17, 2009 the toys were delivered to the Christmas Bureau and were valued at more than \$16,000. The photos below show highlights the substantial amount of toys that Dale Jarrett donated.





### AGENCY WIDE ACCOMPLISHMENTS:

#### *Northwoods Partnership... an opportunity for quality improvement at UCDS*

Union County Department of Social Services sees hundreds of clients on every day of the week throughout the year. Upon arriving at the agency, an individual provides information at the front desk including verification of identification, place of residence and income. This information is shared with the appropriate agency staff so that the right services can be provide in a timely fashion. This process for collecting and routing information increases the likelihood of documents becoming lost because of the practice of manual paper forms and documentation.

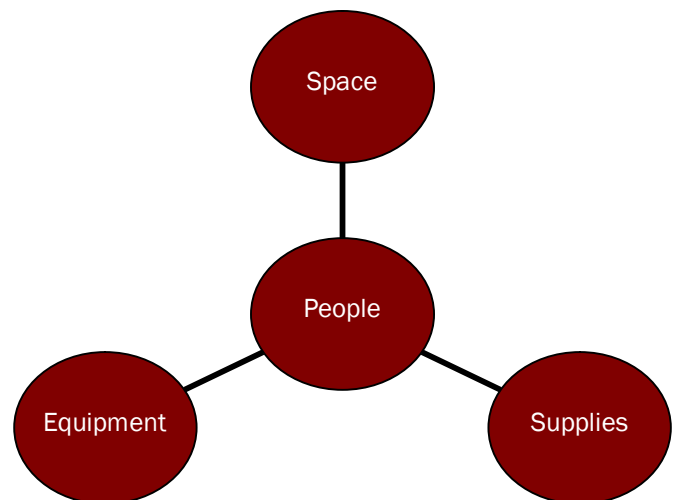
After the client has signed all appropriate forms, the case worker must then walk over to the copier and make copies of all the forms. One copy of the form is given to the client, while the other copy must be manually filed in the appropriate section of the paper case file. This current process adds more paperwork to an already massive paper case file. Open paper case files are either stored in a centralized filing area or stored locally at the case worker's work space. Case workers can have hundreds of files in their office at any given time. Union County Department of Social Services Compass Software Return on Investment Closed case files are stored in a centralized filing area, which is currently filled to capacity. Overflow files are stored wherever room can be found: hallways, lined up outside of offices, etc. Case workers must constantly refer back to the paper case file to obtain necessary information. The process of requesting and locating the paper case file, then finding the appropriate information in the file is laborious and frustrating, especially considering that agency case workers manage hundreds of paper intensive cases per month. Client files contain sensitive, vital information. As a result of the current filing system, information is not sufficiently secured, thus increasing the risk of these critical documents being misplaced or misappropriated. The vital records that comprise the information, knowledge and lifeblood of the organization need to be kept secure. Similarly the risk of losing this information should some sort of calamity or disaster occur is high; and the resulting interruption to the agency's ability to conduct business would be devastating. The capability to quickly resume normal operations and productivity in such a situation is a critical business requirement. In summary, the current processes being used by the Union County DSS agency are labor intensive, time consuming and are more likely to lead to errors and carry a relatively high risk for the agency.

#### Cost Savings Calculations by Category:

The cost savings have been divided into four categories: People, Space, Supplies and Equipment.

These categories represent the majority of the annual administrative spending within social services agencies.

Data was gathered from the agency relating to existing systems, processes and costs in each of the four categories. This data was then applied to historical performance that other, similar agencies have experienced after they implement the Compass solution. In an effort to ensure anticipated benefits are not overstated, conservative estimates were utilized.





### Cost Savings Calculations by Category (continued):

#### People:

The Compass solution enables caseworkers and other agency employees to become more efficient with their time and resources. This results in agencies avoiding the costs of hiring more people than they would otherwise need. Union County DSS could reduce case worker expense by \$7,565,552 and an additional \$384,000 in administrative staff expense.

#### Current System:

Based upon the current number of cases and assuming the agency is currently operating at capacity, each case worker can manage 298 cases per year. Since the caseload volume is expected to grow, the agency would need 39 more case workers than it has today. Including expected attrition rates, 64 people would need to be hired over the next five years to support that case load volume.

### *More Accomplishments:*

UCDSS Human Service Hour: In an effort to increase citizen and stakeholder awareness of the various programs offered through our department, we decided to utilize public television as a medium to accomplish this goal. Our future plans are to include various human service agencies within the county that partner with our agency as a way to educate the citizens about our collaborative efforts.

Clinical Program Children Services: Union's growth has come at a cost to the citizens that need mental health services, as we do not have an adequate number of providers in the county to serve this population. Historically, our children and families have been unable to access clinical services from the predominant provider of mental health services in Union County, PBH (formerly Piedmont Behavioral Health). In the best case scenarios, services from outside providers have been difficult to arrange and untimely. As a result, we realized that our clients referred to approved mental health providers were not able to receive timely appointments for mental health services; therefore, we decided to hire an internal clinician to work with our children and families. This position was necessary to provide quality and timely clinical counseling services to the families and children in the following six (6) units: Family Services; Adoptions; Group Home; Child Protective Services Investigations; In-Home and Work First services. Quality and timely clinical services is a critical need of our clients.

The Clinical Social Worker will provide immediate, comprehensive clinical screening and assessment and continuous therapy/counseling services to our vulnerable children and families. The comprehensive clinical assessment will lead to the identification of needs, the development of a treatment case plan and continuous counseling services to address physical, emotional and mental health issues. This staff person will assure that quality, timely, appropriate, critically needed clinical services are being provided to our families and children. The timely intervention of clinical social work services will decrease repeated CPS cases, decrease reunification time, decrease high risk behaviors and other behavioral issues, decrease the trauma experience by children placed into foster care, decrease long term psychological problems of our children and decrease the incidents of multiple placements. The position will improve families' emotional well-being, mental health, self-sufficiency, problem-solving and daily productivity. Families will increase their skill building skills and increase their outcomes of stable and productive lives.



### A LOOK TO THE FUTURE:

There are many human service issues and needs on the horizon in Union County. In last year's report, we made mention of the vast number of retirements and departmental changes, and how as a department we would need a viable response to close this gap. Since that time, there has been no substantial improvement or rebounding of the economy. Furthermore, on March 23, 2010, the Affordable Health Act became law. The State of North Carolina and local counties are preparing for the impact this change in law will have on our economy and the way in which local Departments of Social Service will have to conduct business.

**Health Care Reform**, including the Patient Protection and Affordable Care Act (PPACA), expands Medicaid to nearly all individuals under age 65 with incomes up to 133% of the federal poverty level (FPL) that will extend coverage in 2014 to large numbers of the nation's uninsured population. Low-income adults who do not have a disability or live with an eligible child will soon qualify for Medicaid when the program is expanded nationwide. There are an estimated 16 million individuals, nationwide, set to gain health insurance in 2014, with more than 660,000 of those living in North Carolina.

At the time of this report, it is estimated that the State of North Carolina will be facing a nearly \$3 billion deficit. Therefore, we must change the way in which we conduct our day-to-day operations. The need exists to have a more effective, streamlined, and integrated approach to service delivery in order to meet the demands of Health Care reform. We must reduce state and county administrative burdens as well as the burden on clients, through technically innovative and customer-driven methods of enhanced access, simplified enrollment, eligibility determination, retention, and program coordination. The Department of Social Services will be focusing its efforts on continuing to be a premier health and human service provider in our region as well as in the State and across the nation. In addition to the focus on continuous quality improvement of the service delivery continuous, another focus will be on workforce development.

Therefore, a future priority continues to be on the recruitment and retention of a quality workforce as well as a cultural shift to meet the demands of an ever-changing industry. Building on the goals from last year, our current priorities are as follows:

- Retention of intellectual capital of retirees
- Expansion of volunteer services
- Focus on grant opportunities
- Development of any ongoing leadership training institute
- Implementation of accountability based standards
- Adopted vision and core values

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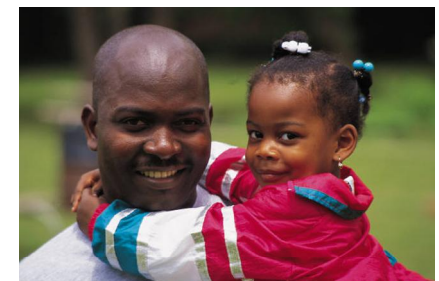
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### *Special Recognition & Acknowledgements:*

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