

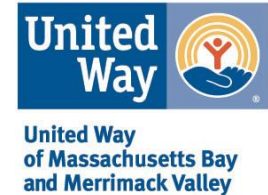


United Way
of Massachusetts Bay
and Merrimack Valley

FY11-FY13 RFP Update – our \$100 million investment

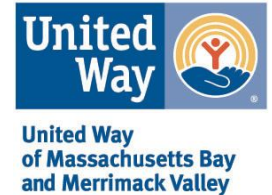
February 4, 2010

Our goals...



- **Ensure children are ready to learn when they enter school**
 - The most valuable and lasting thing we can do for our young children.
 - This dramatically increases chances of lifelong success.
- **Keep youth engaged in learning so they graduate able to compete**
 - Keeping youth engaged in learning significantly increases chance of graduation.
 - Opens up opportunities and allows them to compete in the marketplace.
- **Help families achieve financial stability**
 - Meet their basic needs.
 - Ensure their housing is stable and their incomes are sufficient.

Our measures for fy11-fy13...



Healthy Child Development

- Screening, Assessment and Referral
- Intervention or Treatment
- Building Strong, Competent Families

Increasing Youth Opportunities

- Mentoring
- Civic Engagement and Leadership
- Positive Behaviors
- College and/or Work Ready
- Family Engagement

Family Financial Stability

- Obtain/Retail Affordable Housing
- Gain Basic Skills or Job Skills
- Gain Employment
- Gain Economic Milestones
- Affordable Housing Supply
- Collaborations

Public Policy in all Impact Areas

Basic Needs addressed through Family Financial Stability Fund

Shared Accountability

UWMBMV'S example



Children & Youth

Encouraging positive behaviors

Creating mentoring relationships

Empowering through civic engagement & leadership

Getting ready for college &/or work

Families & Communities

Engaging families in youth learning/development

Increasing housing supply & housing stability

Gaining basic skills, job skills & employment

Gaining economic milestones

Leaders

Advocating for public policies



The investor's questions...

For each opportunity:

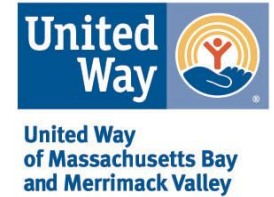
- Will these contributions move us toward our goals?
- What are the chances they will be achieved?
- Does this investment have distinctive features that add value?

Answers tell us whether opportunities are *qualified* for investment

Then:

- Can we afford to invest in this opportunity?
- How much should we invest?

So far – July 2009 through January 2010



- **July** -- Released RFP and Impact Papers for Comment
- **August-October**
 - Released final RFP
 - Agency training – 2 sessions and webinar
 - Application period (10 weeks)
- **October** – Volunteer training – 3 sessions and webinar
- **November** – Volunteer review
- **December** – Staff consistency review
- **January** – Agency interviews

Review results...

Rating and consistency check:

- 595 measure applications (from 178 agencies) reviewed and rated
- 72% considered solid investment opportunities
- 28% questionable

Agency interviews:

- Organizational focus
- 31 agencies interviewed
- 76 measure applications discussed
- 76% considered “qualified” for modeling
- Small number of agencies with unique considerations

Up Next – March to June 2010

March

- Recommendation for agencies with unique considerations
- Program budget

April

- Financial model – discussion
- Memorandum of Agreement -- discussion

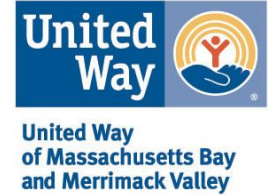
May

- Program budget -- **vote**
- Financial model -- **vote**
- Memorandum of Agreement

June

- Formal recommendation to Board

Discussion...



- What has been your experience with our process?
- What have you heard from donor-volunteers who've been involved?
- What's worked? What should we change?