



Irene Gomez-Bethke Papers.

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September 26, 1985

Irene Gomez-Bethke, President
Centro Legal, Inc.
179 E. Robie Street
St. Paul, MN 55107



United Way

404 South Eighth Street
Minneapolis, Minnesota 55401
Phone 612 340-7400

Dear Ms. Gomez-Bethke:

The final phase of the New Agencies review process is complete. Over 50 proposals have been reviewed and the New Agencies Committee has determined its final recommendations. We are pleased to be able to report to you that your program proposal is being recommended for further consideration by the Allocations Committee for funding in 1986.

The New Agencies Committee will advocate strongly for your program at the final Allocation meeting in November. However, your program will be competing with all other new and already funded programs in the same problem areas. This final meeting begins with recommendations totalling more funds than are available and cuts must be made in most areas recommended. I must warn you that we do not expect that all programs we recommend will be funded. From this meeting, final recommendations will go to the United Way Board of Directors at its November 26 meeting.

Final decisions on any program are made by the Board of Directors. We will notify you as quickly as possible after the November 26 Board meeting. We are unable to provide any further progress reports during this decision process, since all decisions are tentative until the final Board meeting.

We appreciate your patience and hope we can bring good news to you after the process is complete.

Sincerely,

Cynthia Mayeda

Cynthia Mayeda
Chairperson
New Agencies Committee

CMbb

cc: Donn J. Vargas, Administrator ✓

Thanks to you - it works for all of us



CENTRO LEGAL, INC.

A NON-PROFIT COMMUNITY LAW OFFICE

179 E. ROBIE ST.
ST. PAUL, MN 55107
(612) 291-0110

EDMUNDO D. LIJO
Attorney at Law
PHILLIPS F. GONZALEZ GONZALEZ
Attorney at Law

2929 4TH AVE. SO. SUITE L
MINNEAPOLIS, MN 55408
(612) 825-5503

KARIM EL-GHAZZAWY
Chief Legal Officer
AMAYA MAURA
Paralegal

Reply to: Mpls. Office

September 7, 1990

Joanna Buzek
United Way Liaison
United Way of Minneapolis
404 South Eighth Street
Minneapolis, Minnesota 55404

Re: Centro Legal, Inc., - Proyecto Justicia-Minneapolis
Response to United Way Midcycle Report

Dear Ms. Buzek:

This letter serves to address the three questions raised by the Minneapolis United Way's Midcycle Report.

1. How will the new attorney, Mr. Gonzalez's position be funded for the remainder of 1990, and if funding is not available from the United Way in 1991?

Response: Funding for the Immigration Legalization Project (ILP) ended effective May 1st, 1990. Due to the large number of ILP cases, Mr. Gonzalez continued to exclusively work on existing ILP cases through July 31st, 1990. Centro Legal raised sufficient funds to permit Mr. Gonzalez to be shifted to a Proyecto Justicia position effective August 1st, 1990. The position will be funded through year-end 1990, as a result of increased foundation support; increased funding from the Lawyers Trust Account Board (IOLTA) and the Legal Services Advisory Committee (LSAC); and through attorney's fees.

The funding community has recognized Centro Legal's progress and has provided moderate funding increases to Centro Legal during 1990. It is our hope that the United Ways of Minneapolis and St. Paul will increase their respective funding for Proyecto Justicia to permit Mr.



Gonzalez to continue his work throughout 1991. If funding is not available from the United Way during 1991 there is a strong possibility that Mr. Gonzalez's position will be cut.

2. How do you quantify the demand for service in this program?

- How many clients are turned away?
- What method is used to measure the demand?

Response: The vast majority of prospective client contacts are recorded in a client intake sheet. Unfortunately, not every client who requests legal representation receives it due to the fact that we have limited resources. If Centro Legal cannot accept a case due to limited resources, clients are given limited advice over the telephone or by letter, regarding their legal rights and obligations. This type of advice is called open/close and generally requires less than 3 hours of attorney time. Approximately 65% of Proyecto Justicia cases involve giving less than full scale legal representation. Approximately 75% of the clients comprising this 65% figure, request, and cannot be provided with, complete legal representation. The remaining Proyecto Justicia cases are fully accepted, meaning that a retainer agreement is signed and clients are fully represented in judicial and administrative forums at initial and appellate levels. Depending on their complexity, these cases may require between 20 and 100 hours of attorney time to complete.

- Clients are not "turned away", in the sense that persons from our target community who request assistance are given legal advice even if their case is not formally accepted. Approximately 50% of the clients who desire complete legal representation must be "turned away".

- Demand is measured by reviewing the number of clients from the target population that have requested legal representation that have to been given advice on "open/close" basis and comparing this figure with the total service level.

3. Please submit January 1 - June 30, 1990 outcome and service level results.

Response: Centro Legal provided service to 121 Proyecto Justicia clients during the above referenced period.

- Five Proyecto Justicia seminars occurred during this period resulting in assistance to approximately 120 persons. Additionally, staff have appeared on Fresh Air radio and produced a video.

Outcome level results - the above clients received legal advice or representation which increased the likelihood of a favorable resolution of their legal problems in the areas of Immigration, Family, Employment, Social Security, Consumer and Housing law.

Persons attending seminars were made aware of their rights, duties and responsibilities in various areas of law of importance to them.

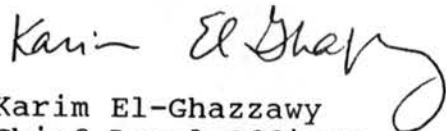
Please note that I have enclosed a copy of Centro Legal's Audit ending December 31, 1989.

Additionally, I have submitted a revised 1991 Proposed Annual Program Budget form, and forms C and D. These budget forms reflect a more realistic increase request of \$44,492 for 1991 as opposed to the \$68,577 previously requested.

Thank you for accommodating my vacation schedule to permit late submission of Centro Legal's response.

Please feel free to contact me should you have any additional questions. I have provided copies of the enclosures to Mr. Hunsberger, our team leader, and Mr. Baumgartner, CPA, the accountant.

Sincerely,



Karim El-Ghazzawy
Chief Legal Officer

KEG/cr

cc: Kimberly M. Roden (Chair)
Toni Green (Vice-Chair)
Jeffrey Hunsberger (Team Leader)
James Baumgartner (Accountant)
Mariana R. Shulstad, Esq. (Program Liaison)
Irene Gomez-Bethke, (Board President)
Thomas J. Barrett, (Board Treasurer)



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404 South Eighth Street
Minneapolis, Minnesota 55404-1084
(612) 340-7400
Fax 340-7675

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November 27, 1990

Irene Gomez-Bethke, President
Centro-Legal, Inc.
4649 Decatur Ave. North
New Hope, MN 55428-4761

Dear Ms. Gomez-Bethke:

The United Way Board of Directors approved the allocations to agency programs on November 27, 1990. We are pleased to notify you that United Way funding for your program(s) in 1991 is as follows:

PROGRAM	1991 UNITED WAY ALLOCATION
Proyecto Justicia	\$ 33,300
TOTAL ALLOCATION	\$ 33,300

The final allocation to your program(s) is the product of many factors: the United Way priority problem your program(s) serve and target population served; competition for limited funds; volunteer review of current and proposed budget information; program performance results; and volunteer visits to your program(s). A detailed summary of United Way funding rationale and our program review is attached.

The volunteers who reviewed your agency and program(s) are prepared to discuss their decisions and observations with you. If you desire further clarification after you have reviewed the written rationale, we ask that you write to your panel chairperson no later than January 11, 1991, detailing the issues you wish to review.

Allocations decisions should be viewed as final except in the most unusual situation. If, after discussion with panel volunteers, you wish to ask for reconsideration of a program allocation, please write a letter to me no later than February 8, 1991. Keep in mind that there are three grounds for reconsideration: 1) significant new information that came to light after October 5, 1990, that if considered would have resulted in a materially different decision; 2) material errors in information submitted by your agency or its restatement by United Way affected the allocation decision; and 3) United Way miscalculated your allocation amount. Reconsideration requests will be resolved by March 29, 1991.

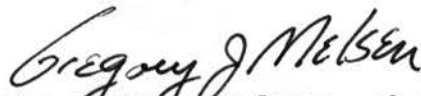
Centro-Legal, Inc.
November 27, 1990
Page 2

Receipt of your agency's full allocation is, of course, dependent upon the continuing delivery of the funded program services throughout 1991. Article II, Sections 1-5 of United Way's bylaws detail the policies which govern the distribution of funds to agencies. United Way expects participating agencies to abide by federal and state laws regarding charitable solicitation (IRS Code Section 170 and Minnesota Statutes Chapter 309) and collective bargaining--in particular, the National Labor Relations Act (Section 7) which recognizes the right of employees to join organizations of their own choosing if that is their desire and to make that choice without interference or coercion and recognizes and respects established bargaining relationships and the negotiated terms and conditions provided for in collective bargaining agreements or equivalent understandings.

All agencies will receive 12 equal monthly allocation payments beginning in January for the period January 1 - December 31, 1991. If you wish a different payment plan because your agency expenditures are not equal each month, a request and a detailed cash flow plan should be submitted to United Way's Allocations Department by February 1, 1991. Revised and approved payment plans will begin in February.

Thank you for all your extra efforts this year. I know we all look forward to another year of high quality human services for the greater Minneapolis community.

Sincerely,



Gregory J. Melsen, Chair
United Way Allocations Committee

GJM/gw

cc: Karim El-Ghazzawy, Chief Legal Ofsr



179 E. ROBIE ST.
ST. PAUL, MN 55107
(612) 291-0110

400 E. LAKE ST.
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(612) 825-5503

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Chief Executive Officer

REPLY TO:

January 13, 1987

Mr. Charles T. Roehrick
Chair - Monitoring Allocations Pannel
Minneapolis United Way
404 South 8th Street
Minneapolis, Minnesota 55404

Dear Mr. Roehrick:

Thank you for the letter dated December 1986, providing us with our panel's decision rationale and expectations for 1987. We appreciate the effort and support we have received from our panel and team liaison during this rather lengthy process.

In reviewing the rationale, it was noted that the panel had questions in 3 areas; 1) Disparity in client statistics, 2) Whether objectives are being met, and; 3) The level of service to Hispanics. Given that the panel went through the effort to pinpoint their concerns, we feel it only appropriate that we be given the opportunity to respond. We feel confident that together we can address the concerns and come to a mutual resolution.

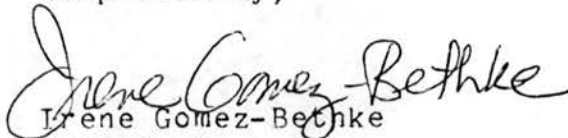
Therefore, we would like to meet with you at your convenience. To discuss the funding rationale as well as how to upgrade our rating from the present level of

Roehrick
1-13-87
page 2

fair. Please do not hesitate to contact us with
suggested meeting dates and times.

Thank you for your time and attention to this request.

Respectfully,


Irene Gomez-Bethke
President
Board of Directors

IGB:bjz

cc: Joanna Buzek
Susan E. Conley
Donn J. Vargas

November 25, 1986



United Way

United Way Center
404 South Eighth Street
Minneapolis, Minnesota 55404
Phone 612 340-7400

Irene Gomez-Bethke, President
Centro-Legal, Inc.
4949 Decatur Avenue North
Minneapolis MN 55428

Dear Ms. Gomez-Bethke:

The United Way Board of Directors approved allocations to agency programs on November 25, 1986. We are pleased to notify you that United Way funding for your programs in 1987 is as follows:

PROGRAM	1987 UNITED WAY ALLOCATION
Proyecto Justicia	\$ 28,500
TOTAL ALLOCATION	\$ 28,500

The final allocations to your programs is the product of many factors: volunteer visits to your programs; priority problem addressed; and program competition for limited funds within a United Way priority category; and volunteer review of budget, program performance reports, and proposed budget information. Detail of the rationale for these allocations and a summary of United Way's 1987 expectations of your programs will be sent to you by December 8, 1986.

Another factor that affected 1987 funding levels was the Allocations Committee's decision to change its guidelines for maintenance from 4 percent increase to 2.5 percent increase. United Way's 1987 campaign fell short of goal reducing the total funds available for allocations to programs. We believe that a reasonable reduction to maintenance allows United Way to continue our commitment to support quality programs and address increased and new needs. Although this was a difficult decision, the Committee was encouraged by the lower current estimate of the rate of inflation, 2 percent.

The panel, which reviewed your agency and programs, is prepared to discuss these decisions and observations with you. If you desire further clarification of your allocation after you have reviewed the written allocations rationale, we ask that you write to your panel chairperson no later than January 15 detailing the issues you wish to review.

The allocations decision should be viewed as final except in the most unusual situation. If, after discussion with your panel, you wish to ask for reconsideration of a program allocation, write a letter to me no later than January 30, 1987. Keep in mind that there are three grounds for reconsideration: 1) material new information that would have resulted in a materially different decision came to light after September 30; 2) material

Thanks to you - it works for all of us

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November 25, 1986
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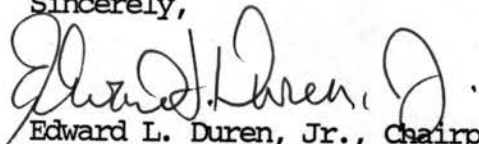
errors in information submitted by your agency or its restatement by United Way which affected the allocations decision; 3) United Way miscalculated your allocation amount. Reconsideration requests will be resolved by April 1, 1987.

Receipt of your agency's full allocation is, of course, dependent upon the continuing delivery of the funded program services throughout 1987. Article II, sections 1-5 of United Way's By-Laws detail the policies which govern the distribution of funds to agencies.

All agencies will receive 12 equal monthly allocation payments beginning in January for the period January 1 - December 31, 1987. If you wish a different payment plan because your agency expenditures are not equal each month, a request and a detailed cash flow plan should be submitted to the Allocations Department by February 2, 1987. Revised and approved payment plans will begin in February.

Thank you for all your extra efforts this year. I know that we all look forward to another year of high quality human services for the greater Minneapolis community.

Sincerely,



Edward L. Duren, Jr., Chairperson
The Allocations Committee

DS/lis

cc: Susan E. Conley, Executive Director
Donn J. Vargas, Administrator



United Way

United Way Center
404 South Eighth Street
Minneapolis, Minnesota 55404
Phone 612 340-7400

March 5, 1987

Irene Gomez-Bethke, President
Centro-Legal, Inc.
4649 Decatur Avenue North
Minneapolis MN 55428

Dear Ms. Gomez-Bethke:

The Allocations Committee approved your panel's recommendation to change the quality rating for the Proyecto Justica program from "fair" to "satisfactory." This change in rating is accompanied by a funding increase of \$713. The new 1987 total allocation to the program/agency is \$29,213.

This decision results from your meeting and letter to panel volunteers. The meeting with panel volunteers was particularly effective in explaining new information and clarifying program operations.

Your discussions with allocations volunteers on this matter has improved communications between your agency and United Way. I look forward to that communication becoming ever more strengthened in 1987.

Sincerely,

Peter W. Lilienthal, Chair.
The Allocations Committee

FWL/gw

cc Susan E. Conley, Executive Director
Donn J. Vargas, Administrator
Charles Roehrick, Chair., 1986 Monitoring Panel
Joanna Buzek, Allocations Panel Staff

Thanks to you - it works for all of us



United Way

United Way Center
404 South Eighth Street
Minneapolis, Minnesota 55404
Phone 612 340-7400

March 24, 1987

Ms. Irene Gomez-Bethke
4649 Decatur Avenue N.
Minneapolis, MN 55428

Dear Ms. Gomez-Bethke

I chair the team of United Way allocations volunteers that will work with your agency this year. We are committed to learning as much as we can about your programs, and the first step will be an orientation meeting of the team and your agency representatives on:

Thursday, April 16
11:00 - 12:00 p.m.
United Way Center
404 S. 8th Street

Team A - McKnight Room
Team B - Scott/Carver Room
Team C - Minneapolis Room

The purpose of the meeting is for the team to learn more about the problem and populations your United Way funded program(s) addresses. Please provide a brief (5-10 minute) presentation on these issues. This meeting is an opportunity to discuss in general terms what we both hope to accomplish this year. It will replace the program/budget presentation meetings previously held in the fall.

The attached Step 1 form is the first step in the Program Assessment System (PAE). The Program Assessment System has four steps. Steps 1 & 2 are used by allocations volunteers on visits to your agency's programs. Steps 3 & 4 are used by allocations volunteers in United Way's decision making phase.

Steps 1 & 2 are most important for United Way's program review. Step 1 (attached) contains program expectations which are intended to focus our discussion with you on matters that will directly affect our 1987 funding decisions. The expectations also set a date when your written comments on the issues raised are due. Please be attentive to these dates.

PLEASE MAIL THE MATERIALS REFERENCED IN YOUR STEP 1 EXPECTATIONS DIRECTLY TO THE TEAM LEADER AND PROGRAM LIAISONS WITH A COPY TO UNITED WAY STAFF BY THE INDICATED DUE DATE.

Step 2: Program Assessment Worksheet contains three basic items which United Way uses to assess all programs. Please be prepared to discuss each of these when your allocations volunteer visits their assigned program.

Thanks to you - it works for all of us

Ms. Irene Gomez-Bethke
March 24, 1987
Page 2

As you know, the United Way's schedule is short, with allocations decisions to be made in mid-September. To make the best use of everyone's time we have assigned an allocations volunteer to each agency program. They will work with your agency's staff and volunteers throughout the year. The United Way volunteers and their assignments are attached.

We look forward to seeing you and working with you this year.

Sincerely,



Sandra S. Bisgaard, Chair
Special Review/Monitoring Panel

c.c. Donn J. Vargas
Panel Leadership, Team and Staff



United Way

404 South Eighth Street
Minneapolis, Minnesota 55404-1084
(612)-340-7400

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Executive Director

James C. Colville

July 28, 1987

Irene Gomez-Bethke
Centro Legal, Inc.
4649 Decatur Avenue North
New Hope, MN 55428

Dear Ms. Gomez-Bethke:

The purpose of this midcycle status report is to summarize the United Way Allocation Team's observations, comments, and questions about your agency and programs at the mid-point of our review cycle. As with your Step 1 Expectations, please forward your response directly to team members with 2 copies to United Way staff by August 21, 1987.

This report is intended as an opportunity to continue the dialogue concerning your agency and its programs. Your response to the status report enables you to address the mid-cycle comments and further discuss your plans for 1988 before the team makes final funding recommendations.

For each program, the team has organized its remarks into three sections:

- a) Mid-cycle Program Quality Rating and Discussion
- b) Status of Step 1 Expectations (sent to you in April)
- c) Additional Questions that remain about your program operation or your 1988 funding request.

The team will consider your response and base its final recommendations on three principle factors:

- Priority of the problem addressed by each program
- Effectiveness of the program in addressing the problem
- Competition for available funds

Allocations volunteers and staff sincerely appreciate your efforts to date, and they are committed to working with you to understand your objectives, performance and the specific role you propose for United Way dollars. Team members may continue to visit your agency through early September. If you have specific questions please feel free to call team members or United Way staff.

Sincerely,

David Rudnick

David Rudnick
Special Review, Team C

DR/kp

cc: Martin Diaz



100 YEARS
OF CARING

It brings out the best in all of us.

STEP 3: PROGRAM ASSESSMENT SUMMARY

AGENCY: Centro Legal

PROGRAM: Projecto Justicia - Legal Services

PROBLEM(s)/PRIORITY: Discrimination

EVALUATION STATUS: Level 1

MIDCYCLE QUALITY ASSESSMENT: SATISFACTORY

DISCUSSION/EXAMPLES:

- o Evaluation status Level 1 is affirmed for this program.
- o Program performance reports have been revised. Preliminary data indicates program is meeting outcome and service level objectives.
- o Program clients: 76% low income households (below \$10,000) 66% minority (45% hispanic).

1987 EXPECTATIONS DUE JUNE 5, 1987, HAVE BEEN MET.

ADDITIONAL QUESTIONS - RESPONSE DUE AUGUST 21, 1987:

1. Explain the reason for shifting legal service monies (IOLTA and ISAC) to the St. Paul service area.
 2. Explain the proposed reduction of Foundation support to this program.
- o Due to limited funds, the team is unable to further consider the request for expanded funding for the 1.0 FTE law clerk position.



United Way

United Way Center
404 South Eighth Street
Minneapolis, Minnesota 55404
Phone 612 340-7400

March 5, 1987

Irene Gomez-Bethke, President
Centro-Legal, Inc.
4649 Decatur Avenue North
Minneapolis MN 55428

Dear Ms. Gomez-Bethke:

The Allocations Committee approved your panel's recommendation to change the quality rating for the Proyecto Justica program from "fair" to "satisfactory." This change in rating is accompanied by a funding increase of \$713. The new 1987 total allocation to the program/agency is \$29,213.

This decision results from your meeting and letter to panel volunteers. The meeting with panel volunteers was particularly effective in explaining new information and clarifying program operations.

Your discussions with allocations volunteers on this matter has improved communications between your agency and United Way. I look forward to that communication becoming ever more strengthened in 1987.

Sincerely,

Peter W. Lilienthal

Peter W. Lilienthal, Chair.
The Allocations Committee

FWL/gw

cc Susan E. Conley, Executive Director
✓ Donn J. Vargas, Administrator
Charles Roehrick, Chair., 1986 Monitoring Panel
Joanna Buzek, Allocations Panel Staff

Thanks to you - it works for all of us

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United Way

United Way Center
404 South Eighth Street
Minneapolis, Minnesota 55404
Phone 612 340-7400

March 5, 1987

Irene Gomez-Bethke, President
Centro-Legal, Inc.
4649 Decatur Avenue North
Minneapolis MN 55428

Dear Ms. Gomez-Bethke:

The Allocations Committee approved your panel's recommendation to change the quality rating for the Proyecto Justicia program from "fair" to "satisfactory." This change in rating is accompanied by a funding increase of \$713. The new 1987 total allocation to the program/agency is \$29,213.

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Sincerely,

Peter W. Lilienthal

Peter W. Lilienthal, Chair.
The Allocations Committee

PWL/gw

cc Susan E. Conley, Executive Director
Donn J. Vargas, Administrator
Charles Roehrick, Chair., 1986 Monitoring Panel
Joanna Buzek, Allocations Panel Staff

Thanks to you - it works for all of us

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MINNEAPOLIS, MN 55408
(612) 825-5503

Board of Directors

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Chief Executive Officer

REPLY TO:

January 30, 1987

Mr. Edward L. Duren, Jr.
Chairperson
The Allocations Panel
Minneapolis United Way
404 South Eighth Street
Minneapolis, Mn. 55404

Dear Mr. Duren:

As delineated in your letter dated November 25, 1986 regarding the process for reconsideration of our program allocation status, please be advised that we wish to apply for reconsideration for the following reasons.

On January 20, 1987 at our request, we met with Mr. Charles T. Roehrick (Chair-Monitoring allocations panel) and United Way staff. The purpose of this meeting was to respond to a letter we received dated December 1986 explaining our panel's decision rational and expectations for 1987. We felt that it was in our best interest to meet with Mr. Roehrick and key staff in order to address the concerns outlined in their letter. To quickly recap, the concerns of the panel listed were; 1. Disparity in client statistical reports, 2. Whether objectives are being met and 3. The level of service to Hispanics. This resulted in our program receiving a Fair rating.

Mr. Roehrick, explained that the decision of the panel was due to the material that is was given to review. In reviewing that material it was noted that the statistics varied on 3 different reports confusing panel members, and when attempting to use the statistical information to quantify the outcome objectives the panel found itself unable to do so. This then led the panel members to question not only the accuracy of the statistics, but whether the outcome objectives listed were realistic and if

the proposed level of service to Hispanic clients would be met.

Our response was while we agreed with the observations that the reports did in fact contain different sets of numbers, we went on to explain that the reason for that was due to some confusion as well as our volunteer panel requests.

Initially when we drafted our program description as per United Way guidelines, it was reflective of our total agency services with exception to the goals, outcome objectives, and outcome measures. These were developed to concentrate on services to Hispanics in Minneapolis only. As a result our initial client demographics contained total 1985 agency service levels (St. Paul/Minneapolis) as well as service levels only in Minneapolis for 1986.

When we reexamined our program report and discovered the potential problem we worked with United Way staff to redefine our client reports to be reflective only of service levels in Minneapolis. Unfortunately in attempting to give as accurate a picture possible for our panel members all we did was to confuse them. Additionally we explained that our case load varies during the course of the year and some of our services were completed during the final quarter of 1986 and are not reflected in our program reports.

After our response to the concerns listed, Mr. Roehrick along with the United Way staff agreed that; This new information did in fact clarify the issue about the program reports and the outcome objectives. Mr. Roehrick went on to state that he felt that our level of service was adequate and he felt confident that Hispanics were receiving proper care from our program.

Given this new information Mr. Roehrick was inclined to recommend to the review panel that our program status be upgraded from "Fair" to "Satisfactory". As we are in the process of working jointly with the P.D. and E. Department of the United Way he felt that we should be able to avoid the difficulty that was encountered in 1986 by both United Way and Centro Legal.

Therefore, we are requesting that our 1987 program allocation be reconsidered by the United Way, that our program status be upgraded from "Fair" to "Satisfactory" and that the proper adjustments be made to reflect this new status.

We appreciate the assistance we have received from the United Way Volunteers and staff in addressing these concerns and feel confident that together we have been able to come to a mutual agreement.

Respectfully:

Irene Gomez-Bethke

Irene Gomez-Bethke
President
Board of Directors

DJV/

cc. United Way Leadership/Staff
Centro Legal Board of Directors



COPY

179 E. ROBIE ST.
ST. PAUL, MN 55107
(612) 291-0110

400 E. LAKE ST.
MINNEAPOLIS, MN 55408
(612) 825-5503

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Chief Executive Officer

REPLY TO:

January 13, 1987

Mr. Charles T. Roehrick
Chair - Monitoring Allocations Pannel
Minneapolis United Way
404 South 8th Street
Minneapolis, Minnesota 55404

Dear Mr. Roehrick:

Thank you for the letter dated December 1986, providing us with our panel's decision rationale and expectations for 1987. We appreciate the effort and support we have received from our panel and team liaison during this rather lengthy process.

In reviewing the rationale, it was noted that the panel had questions in 3 areas; 1) Disparity in client statistics, 2) Whether objectives are being met, and; 3) The level of service to Hispanics. Given that the panel went through the effort to pinpoint their concerns, we feel it only appropriate that we be given the opportunity to respond. We feel confident that together we can address the concerns and come to a mutual resolution.

Therefore, we would like to meet with you at your convenience. To discuss the funding rationale as well as how to upgrade our rating from the present level of

Roehrick

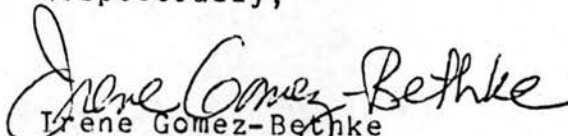
1-13-87

page 2

fair. Please do not hesitate to contact us with
suggested meeting dates and times.

Thank you for your time and attention to this request.

Respectfully,


Irene Gomez-Bethke
President
Board of Directors

IGB:bjz

cc: Joanna Buzek
Susan E. Conley
Donn J. Vargas



United Way

United Way Center
404 South Eighth Street
Minneapolis, Minnesota 55404
Phone 612 340-7400

December 1986

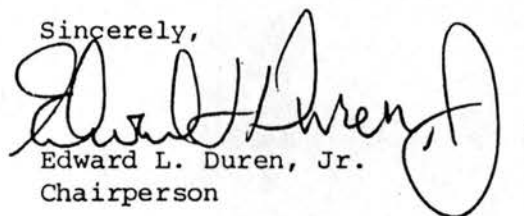
Dear Board President:

The enclosed forms contain your Allocation panel's decision rationale and 1987 expectations for United Way funded programs at your agency. This is the "detailed" information that was referred to in my November 25 letter to you.

We hope this additional information will improve understanding between United Way and funded agencies. We intend to provide you with a clear picture of our funding rationale. In addition, we wish to alert you, as early as possible, to issues that we should work together to resolve in 1987.

I hope the enclosed material is helpful. If you have any questions, please do not hesitate to call your panel chair, team leader, or panel staff at United Way.

Sincerely,



Edward L. Duren, Jr.
Chairperson

ED:jb
Enclosures
cc: Executive Director

Thanks to you - it works for all of us

November 25, 1986

Irene Gomez-Bethke, President
Centro-Legal, Inc.
4949 Decatur Avenue North
Minneapolis MN 55428



United Way

United Way Center
404 South Eighth Street
Minneapolis, Minnesota 55404
Phone 612 340-7400

Dear Ms. Gomez-Bethke:

The United Way Board of Directors approved allocations to agency programs on November 25, 1986. We are pleased to notify you that United Way funding for your programs in 1987 is as follows:

PROGRAM	1987 UNITED WAY ALLOCATION
Proyecto Justicia	\$ 28,500
TOTAL ALLOCATION	\$ 28,500

The final allocations to your programs is the product of many factors: volunteer visits to your programs; priority problem addressed; and program competition for limited funds within a United Way priority category; and volunteer review of budget, program performance reports, and proposed budget information. Detail of the rationale for these allocations and a summary of United Way's 1987 expectations of your programs will be sent to you by December 8, 1986.

Another factor that affected 1987 funding levels was the Allocations Committee's decision to change its guidelines for maintenance from 4 percent increase to 2.5 percent increase. United Way's 1987 campaign fell short of goal reducing the total funds available for allocations to programs. We believe that a reasonable reduction to maintenance allows United Way to continue our commitment to support quality programs and address increased and new needs. Although this was a difficult decision, the Committee was encouraged by the lower current estimate of the rate of inflation, 2 percent.

The panel, which reviewed your agency and programs, is prepared to discuss these decisions and observations with you. If you desire further clarification of your allocation after you have reviewed the written allocations rationale, we ask that you write to your panel chairperson no later than January 15 detailing the issues you wish to review.

The allocations decision should be viewed as final except in the most unusual situation. If, after discussion with your panel, you wish to ask for reconsideration of a program allocation, write a letter to me no later than January 30, 1987. Keep in mind that there are three grounds for reconsideration: 1) material new information that would have resulted in a materially different decision came to light after September 30; 2) material

Thanks to you - it works for all of us

Irene Gomez-Bethke
November 25, 1986
Page Two

errors in information submitted by your agency or its restatement by United Way which affected the allocations decision; 3) United Way miscalculated your allocation amount. Reconsideration requests will be resolved by April 1, 1987. *1987 short*

Receipt of your agency's full allocation is, of course, dependent upon the continuing delivery of the funded program services throughout 1987. Article II, sections 1-5 of United Way's By-Laws detail the policies which govern the distribution of funds to agencies.

All agencies will receive 12 equal monthly allocation payments beginning in January for the period January 1 - December 31, 1987. If you wish a different payment plan because your agency expenditures are not equal each month, a request and a detailed cash flow plan should be submitted to the Allocations Department by February 2, 1987. Revised and approved payment plans will begin in February.

Thank you for all your extra efforts this year. I know that we all look forward to another year of high quality human services for the greater Minneapolis community.

Sincerely,

Edward L. Duren, Jr.
Edward L. Duren, Jr., Chairperson
The Allocations Committee

*\$30,131
690*

DS/lis

cc: Susan E. Conley, Executive Director
Donn J. Vargas, Administrator



November 28, 1989

United Way

404 South Eighth Street
Minneapolis, Minnesota 55404-1084
(612) 340-7400

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flo h. wiger

Laura Waterman Wittstock

Executive Director

James C. Colville

Irene Gomez-Bethke, President
Centro-Legal, Inc.

4649 Decatur Ave. North
New Hope, MN 55428

Dear Ms. Gomez-Bethke:

The United Way Board of Directors approved the allocations to agency programs on November 28, 1989. We are pleased to notify you that United Way funding for your program(s) in 1990 is as follows:

PROGRAM	1990 UNITED WAY ALLOCATION
Proyecto Justicia	\$ 32,000
TOTAL ALLOCATION	\$ 32,000

The final allocation to your program(s) is the product of many factors: priority problem and target population served; competition for limited funds; volunteer review of current and proposed budget information; program performance results; and volunteer visits to your program(s). A detailed summary of United Way funding rationale and our program review are attached.

The volunteers who reviewed your agency and program(s) are prepared to discuss their decisions and observations with you. If you desire further clarification after you have reviewed the written rationale, we ask that you write to your panel chairperson no later than January 12, 1990 detailing the issues you wish to review.

Allocation decisions should be viewed as final except in the most unusual situation. If, after discussion with panel volunteers, you wish to ask for reconsideration of a program allocation, please write a letter to me no later than February 9, 1990. Keep in mind that there are three grounds for reconsideration: 1) significant new information that came to light after October 6, 1989, that if considered would have resulted in a materially different decision; 2) material errors in information submitted by your agency or its restatement by United Way affected the allocation decision; and 3) United Way miscalculated your allocation amount. Reconsideration requests will be resolved by March 30, 1990.

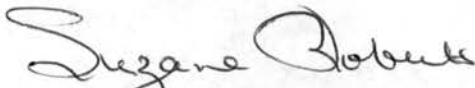
Centro-Legal, Inc.
November 28, 1989
Page 2

Receipt of your agency's full allocation is, of course, dependent upon the continuing delivery of the funded program services throughout 1990. Article II, Sections 1-5 of United Way's Bylaws detail the policies which govern the distribution of funds to agencies.

All agencies will receive 12 equal monthly allocation payments beginning in January for the period January 1 - December 31, 1990. If you wish a different payment plan because your agency expenditures are not equal each month, a request and a detailed cash flow plan should be submitted to United Way's Allocations Department by February 2, 1990. Revised and approved payment plans will begin in February.

Thank you for all your extra efforts this year. I know we all look forward to another year of high quality human services for the greater Minneapolis community.

Sincerely,



Suzanne M. Roberts, Chair
United Way Allocations Committee

SMR/gw

cc: Martin Diaz, Chief Legal Officer
Donn J. Vargas, Administrator

1989 FINAL PROGRAM REPORT

AGENCY: CENTRO LEGAL

PROGRAM: Projecto Justicia - Legal Services

PROBLEM(s)/PRIORITY: Discrimination

EVALUATION STATUS: Level 1 - outcomes and services

FINAL ASSESSMENT: SATISFACTORY

DISCUSSION/COMMENT:

The team has had several meetings with the agency this year and in the last few months we have received information to alleviate many of our initial concerns.

The agency's financial health has improved and the team has revised the financial risk assessment summary sheet accordingly. Also, the level of service appears to have stabilized after a transition period while a new executive came on board.

1988 YEAR END PERFORMANCE DATA COMMENT:

Program exceeds outcome and service level objectives and 1987 results.

Total number of clients served increased by 41, from 238 in 1987 to 279 in 1988.

EXPECTATIONS DUE JUNE 2, 1989:

1. Maintain program as described.
2. Explain the decreases described in 1989 program description: Program in transition - new Executive Director and program director. 1989/90 projections are more realistic.
 - 220 clients will receive direct representation (down from 238 clients measured in 1988 performance reports and 279 actually served).
 - 100 individuals will be provided legal education through at least 3 seminars (down from 120 participants measured in the 1988 performance report and 200 actually served in 8 seminars).

ADDITIONAL QUESTIONS - RESPONSE DUE JULY 31, 1989:

1. Please describe the specific increases in outcomes and services that are projected if the expanded funding of \$7,875 for 0.3 FTE attorney is allocated in 1990. MET. Most recent estimates are to serve 237 client sin 1990 and 286 clients in 1991.

Projecto Justicia - Legal Services - 2

2. Provide copies of the 1988 audited financial statements and provide support for funding sources that retired the Internal Revenue Service debt. MET. Audit received 9-8-89 showing IRS debt has been retired.

1989 Allocation: \$30,766

1990 Request: \$39,564 % Change: 29.0% Dollar Change: \$8,798

1990 Allocation: \$ 32,000 % Change: 4% Dollar Change: \$8,798

Funding Status: (circle one) new, expand, replace, on-going, reduce

OVERALL FUNDING RATIONALE:

4% increase according to United Way funding guidelines for the indicated program Final Assessment.

Funding to meet your request for \$10,260 additional funds to support 0.3 FTE attorney position isn't recommended due to limited funds and the Allocations Guidelines for a satisfactory program assessment rating. The team has decided to maintain Centro Legal in United Way's full review allocations process for 1990. Although much progress toward program and financial stability was made in 1989, the team wishes to see further evidence of clear accounting procedures and financial stability and to monitor results of this year's efforts.

1990 EXPECTATIONS - RESPONSE DUE FEBRUARY 5, 1990:

1. Please submit 1988-89 year end program performance report for outcomes, service levels and client demographics.
2. Please submit the program description including goals, objectives and measurement tools by February 5, 1990 with final agreement on these by members of the allocations team by June 1, 1990.
3. During the review year, please work closely with team members on United Way's Financial risk Assessment and Agency Stability Assessment tools.



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Minneapolis, Minnesota 55404-1084
(612) 340-7400
Fax 340-7675

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**President and
Chief Professional Officer**
James C. Colville

MEMORANDUM

TO: Irene Gomez-Bethke, President
Centro-Legal, Inc.

FROM: Jeffrey Hunsberger, C-4 Team Leader

DATE: March 26, 1990

As in previous years, United Way is beginning its review of funded programs. The enclosed materials set the stage for that review. We follow a four step process called the Program Assessment System which begins in April and finishes with funding decisions in November.

The four steps emphasize good United Way/agency communications and are designed to make our allocations process as fair and objective as possible. They focus our evaluation on four areas: outcome objectives, service level objectives, target populations, and barriers to service. The four steps are:

Step 1: Expectations: (March) identifies issues which will be addressed at the volunteer liaison site visit. (green attachment)

Step 2: Program Assessment Worksheet: defines Program Assessment Ratings and is used on site visits. (blue attachment)

Step 3: Program Assessment Summary: (July) mid-cycle report to the agency which states the preliminary Program Assessment Rating and issues for further discussion prior to funding decision making.

Step 4: Funding Recommendation: (November) gives a final Program Rating, the level of funding for the next two years, and the rationale for the rating and funding recommendation.

The 1990 team of United Way allocations volunteers that will work with your agency is committed to learning as much as we can about your programs. The first step in our review process will be a meeting of the team and your agency representatives on:

DATE: * April 26, 1990
TIME: 2:30 - 3:00 p.m.
PLACE: Sabathani Community Center-310 East 38th Street, Mpls.

The purpose of the meeting is to introduce ourselves, the allocations team, to your program staff and to clarify the team's "expectations" as stated in the Program Assessment System - Step 1: Expectations (green attachment). In addition to discussion, we require written comments from your agency on the issues raised.

Please mail your written response to Step 1: Expectations directly to team members with a copy to United Way staff by May 25, 1990

The United Way volunteers and their assignments will be mailed to you mid-April. We will assign allocations volunteer(s) to review each United Way funded program at your agency. We look forward to working with you this year.

c.c. Karim El-Ghazzawy, Chief Legal Officer

enclosures: Step 1: Expectations (green)
Step 2: Program Assessment Worksheet (blue)



United Way

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Minneapolis, Minnesota 55404-1084
(612) 340-7400
Fax 340-7675

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President and Chief Professional Officer

James C. Colville

April 6, 1990

MEMORANDUM

To: Agency Executive Directors

From: Art Serotoff
Allocations Director

Re: 1991-92 Biennial Budget Proposal Package

The forms and instructions you need to request 1990-91 funding from United Way of Minneapolis for currently funded and new programs are included in this package. Below I have highlighted several items that I believe are important for your strategic thinking in putting this request together. In addition, I attached a calendar of key dates (grey) in United Way's "full review" cycle that I hope will be helpful in your planning.

Ongoing Program Request

Please develop your budgets using your best estimate of increased costs and start by determining the amount of increase necessary to operate the program at current levels of service. As has occurred in the past, the amount available from United Way for on-going increase may vary depending on Campaign achievement.

New and Expanded Program Requests

Please limit your requests to one new program and two expansions per agency. We define expanded funding requests as those that add staff and/or service to currently funded programs.

The Allocations Committee recognizes that the process for proposing and reviewing new and expanded requests is difficult and time consuming. The limits described above are an attempt to reduce workload for both agencies and allocations volunteers. It also is an attempt to bring requests more into line with available funds and the actual chances of funding. Requests last year totalled 39% over the previous year's allocation and were 27% over available funds. One out of four new program requests and one of three expansions were funded. We believe much energy has been expended in the past for programs that eventually did not get funded. We think that by limiting the request, United Way volunteers and agency staff will be able to concentrate energies on fewer, quality proposals that stand a better chance of being funded.

Priorities for New and Expanded Program Funding

Allocations is working with the same set of priorities that we used for the past two years. We have simplified areas where special consideration will be given for new and expanded programming. The Board of Directors passed the following policies:

- Funding for 1991 and 1992 new and expanded programs should be distributed according to established priority categories and policies (categories in priority order attached-lavendar).
- Special consideration for 1991 and 1992 funding for new and expanded programming will be given to proposals that address two general programming areas which apply to all priority problems. These are:
 - o Programming to serve residents in suburban Hennepin, Anoka, Dakota, Scott and Carver Counties according to Minneapolis United Way Service Area boundaries (map attached-gold).
 - o Programming that will improve the conditions for people of color--e.g., ensures access to service, emphasizes recruitment, training and employment of people of color and volunteers and/or uses service methodology specific to the circumstances and needs of people of color.

Summer Youth Programming

United Way has decided to treat proposals for summer youth programming within our usual competitive process, subject to the priorities framework and funding guidelines organized by program assessment rating.

Although United Way responded with special one-time summer grants in each of the past three years, we were concerned about creating a precedent within the ongoing funding process.

Getting Your Proposal to United Way Reviewers

As in the past three years, we ask that you mail proposal materials directly to the United Way volunteers assigned to your agency with requisite copies to United Way. The attached checklist (green) and roster (buff) indicate how these items may be routed.

** PLEASE SUBMIT THE COMPLETE PACKAGE TO UNITED WAY WITH REQUISITE MATERIALS TO ALLOCATIONS VOLUNTEERS BY MAY 25, 1990. **

Do not hesitate to call Art Serotoff (340-7619) or DeLoris Swanson (340-7592) with any questions.

AS/gw

cc Agency Chief Volunteer Officer - (cover letter only)

Attach: Package Sections I-III
Priorities List
Service Area Map
United Way Volunteer Roster
Full Review Calendar



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404 South Eighth Street
Minneapolis, Minnesota 55404-1084
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Fax 340-7675

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President and Chief Professional Officer

James C. Colville

December 12, 1990

Dear Agency Executive:

Happy Holidays!

This package contains our request for program and budget information we need from your agency to begin our 1991 full review process. The information you submit is also aggregated for use in United Way campaign and communication efforts.

PLEASE SUBMIT REQUESTED MATERIALS TO UNITED WAY
BY FEBRUARY 4, 1991

Changes from the 1990 Request

- o Checklist - Submission format - This year we ask that agencies collate packages according to who receives the information. The checklist shows this. In this way you see exactly what information each volunteer receives (e.g., panel chair, team leader, accountant, program liaison, etc.).
- o Items deleted from previous requests
 - Barriers to Service Description in the program description and Barriers to Service Report.
 - Special descriptors item on "types" of clients (e.g., general public, currently experiencing the problem, high risk, etc.).
 - Special descriptor item on percent of staff time directed at Legislative/Institutional/Systems Advocacy.

This package has five sections of requests:

1. 1991 Annual Agency/Program Budgets (salmon)
2. 1991 Agency Profile (buff)
3. 1991 Program Description(s) (goldenrod)
4. 1990 and 1989 Program Performance Report (white)
5. Special Program Descriptors (yellow)

A checklist (blue) of all materials due on February 4, 1991 is included. It is important to follow the submission instructions and use the forms requested in each section. If you have any questions, please phone your United Way Panel Staff representative or DeLoris Swanson (340-7592).

May you have a good and successful year. We look forward to working with you in 1991.

Sincerely,

Art Serotoff, Director
Allocations Department

AS/gw

Attach:

cc Agency Board of Directors Chair/President (letter only)



United Way

United Way Center
404 South Eighth Street
Minneapolis, Minnesota 55404
Phone 612 340-7400

To: United Way Participating Agencies

From: Byron Laher

Date: April 4, 1986

Subject: Insurance - Good News

Our Insurance Bill passed the legislature.

In the last hour of the House session, the insurance conference committee report (the big insurance bill) was amended to our insurance proposal. The legislation which actually passed was a 65 page amendment to our bill.


There are at least three provisions of the legislation with a direct effect on charitable organizations.

1. Section 8 is our language. It authorizes the establishment of non-profit indemnification trusts under rules to be promulgated by the Commissioner of Insurance. Representatives of the Minneapolis Foundation and the Minneapolis Non-Profit Assistance Fund have been meeting and may establish this type of an insurance vehicle for charities. We will be meeting with the insurance Commissioner within the next few weeks to discuss the rule making process.

More details later.

2. Section 20 creates the Minnesota Joint Underwriting Association (JUA) which gives the Commissioner of Insurance authority to provide Insurance coverage to organizations which cannot obtain it through the voluntary market.

There will be much written about this provision in the coming months. We will keep you informed.

- 
3. Section 62 grants immunity from liability to directors or trustees of non-profit organizations who are not paid for their services.

We have asked legal counsel to review this section to determine what effect, if any, it should have regarding agency decisions to purchase directors and officers liability insurance. We hope to have an analysis to send to you within the next few weeks.

Thanks to you - it works for all of us

November 25, 1986

Irene Gomez-Bethke, President
Centro-Legal, Inc.
4949 Decatur Avenue North
Minneapolis MN 55428

Dear Ms. Gomez-Bethke:

The United Way Board of Directors approved allocations to agency programs on November 25, 1986. We are pleased to notify you that United Way funding for your programs in 1987 is as follows:

PROGRAM	1987 UNITED WAY ALLOCATION
Proyecto Justicia	\$ 28,500
TOTAL ALLOCATION	\$ 28,500

The final allocations to your programs is the product of many factors: volunteer visits to your programs; priority problem addressed; and program competition for limited funds within a United Way priority category; and volunteer review of budget, program performance reports, and proposed budget information. Detail of the rationale for these allocations and a summary of United Way's 1987 expectations of your programs will be sent to you by December 8, 1986.

Another factor that affected 1987 funding levels was the Allocations Committee's decision to change its guidelines for maintenance from 4 percent increase to 2.5 percent increase. United Way's 1987 campaign fell short of goal reducing the total funds available for allocations to programs. We believe that a reasonable reduction to maintenance allows United Way to continue our commitment to support quality programs and address increased and new needs. Although this was a difficult decision, the Committee was encouraged by the lower current estimate of the rate of inflation, 2 percent.

The panel, which reviewed your agency and programs, is prepared to discuss these decisions and observations with you. If you desire further clarification of your allocation after you have reviewed the written allocations rationale, we ask that you write to your panel chairperson no later than January 15 detailing the issues you wish to review.

The allocations decision should be viewed as final except in the most unusual situation. If, after discussion with your panel, you wish to ask for reconsideration of a program allocation, write a letter to me no later than January 30, 1987. Keep in mind that there are three grounds for reconsideration: 1) material new information that would have resulted in a materially different decision came to light after September 30; 2) material

Thanks to you - it works for all of us



United Way

United Way Center
404 South Eighth Street
Minneapolis, Minnesota 55404
Phone 612 340-7400



Irene Gomez-Bethke
November 25, 1986
Page Two

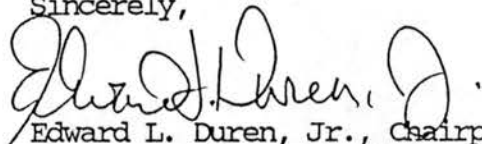
errors in information submitted by your agency or its restatement by United Way which affected the allocations decision; 3) United Way miscalculated your allocation amount. Reconsideration requests will be resolved by April 1, 1987.

Receipt of your agency's full allocation is, of course, dependent upon the continuing delivery of the funded program services throughout 1987. Article II, sections 1-5 of United Way's By-Laws detail the policies which govern the distribution of funds to agencies.

All agencies will receive 12 equal monthly allocation payments beginning in January for the period January 1 - December 31, 1987. If you wish a different payment plan because your agency expenditures are not equal each month, a request and a detailed cash flow plan should be submitted to the Allocations Department by February 2, 1987. Revised and approved payment plans will begin in February.

Thank you for all your extra efforts this year. I know that we all look forward to another year of high quality human services for the greater Minneapolis community.

Sincerely,


Edward L. Duren, Jr., Chairperson
The Allocations Committee

DS/lis

cc: Susan E. Conley, Executive Director
Donn J. Vargas, Administrator

*Appeal
Thier
decision*



United Way

United Way Center
404 South Eighth Street
Minneapolis, Minnesota 55404
Phone 612 340-7400

December 1986

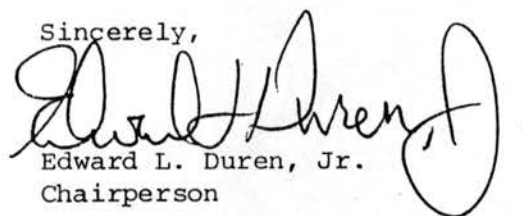
Dear Board President:

The enclosed forms contain your Allocation panel's decision rationale and 1987 expectations for United Way funded programs at your agency. This is the "detailed" information that was referred to in my November 25 letter to you.

We hope this additional information will improve understanding between United Way and funded agencies. We intend to provide you with a clear picture of our funding rationale. In addition, we wish to alert you, as early as possible, to issues that we should work together to resolve in 1987.

I hope the enclosed material is helpful. If you have any questions, please do not hesitate to call your panel chair, team leader, or panel staff at United Way.

Sincerely,



Edward L. Duren, Jr.
Chairperson

ED:jb
Enclosures
cc: Executive Director

Thanks to you - it works for all of us

1987 PROGRAM ALLOCATION

AGENCY: CENTRO LEGAL

PROGRAM: Proyecto Justicia - Legal Services

PROBLEM(s)/PRIORITY: Discrimination

EVALUATION STATUS: Level 1: outcomes and services reported.

FINAL PROGRAM ASSESSMENT Weak Fair Satisfactory Good Exceptional

Rationale:

Preliminary results of this newly funded program are unclear and uneven. For example, there is disparity between January - April performance data (which shows 43 unduplicated clients), the agency response to the mid-cycle report (which shows 138 unduplicated clients), and new information provided in September (to show 169 unduplicated clients). The team lacks confidence in the information to show that objectives are being met and that appropriate and adequate service is provided to Hispanics in the United Way of Minneapolis service area.

1987 ALLOCATION: \$28,500 Change: 0%

FUNDING STATUS: (Circle One) new, expand, replacement, maintain, reduce

OVERALL FUNDING RATIONALE: (tie to quality assessment, funding status, and quantify how funds will be used):

No increase is granted to this program which has not demonstrated clear results. United Way funding for this program is in jeopardy unless data reporting is improved and the program can clearly demonstrate that objectives are being met.

1987 EXPECTATIONS: Due by February 13, 1987.

1. Maintain program operations as described.
2. Submit budget and data reports on schedule and as requested by the United Way.
3. Submit 1986 year-end (January - December) data with 1987 revised budget by February 13, 1987.



United Way

United Way Center
404 South Eighth Street
Minneapolis, Minnesota 55404
Phone 612 340-7400

TO: Miriam Cohn
Irene Gomez-Bethke
Jan Imsland
Captain James
Doug Jones
Diane Malone

FROM: Caty Reid, Director
PD&E Department

DATE: July 22, 1986

SUBJECT: "Wrap-Up Meeting"

As previously mentioned, there will be a PD&E and Allocations joint "wrap-up" meeting to discuss the Salvation Army Temple Corps program.

DATE: Wednesday, August 6

TIME: 3:00-4:30

LOCATION: United Way Center
404 South Eighth Street

ROOM: Room B, Third Floor

If you have any questions regarding this meeting, please call Caty Reid at 340-7421.

CR:jb

cc: Allocations Staff

Thanks to you - it works for all of us



United Way

404 South Eighth Street
Minneapolis, Minnesota 55404-1084
(612) 340-7400

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Flo H. Wiger

Kenneth A. Willcox
Laura Waterman Wittstock

Executive Director
James C. Colville

January 24, 1989

Dear Board President,

The attached report, "Reaching Our Community's Needs", illustrates the diversity of impact United Way funding has on the community. The report details results of volunteers' decisions for 1989. Most importantly, the report is a tribute to United Way funded agencies.

Behind the summed dollar amounts, are the individual programs that agencies operate. The "Analysis of United Way 1989 Program Funding" (pages 4-17) documents results on serious community problems such as Early Childhood Deprivation, Discrimination, AIDS & Other Communicable Diseases, etc. This section also highlights new programs funded in 1989, United Way allocations to populations most in need, funding to geographic areas and the proportion of funding that supports prevention and intervention strategies. The final section lists specific 1989 allocations to individual agency programs.

I hope you will take a moment to look through this report. Much is happening in our community to address health and human service problems. I am glad we are doing this work together.

Sincerely,

Kenneth Willcox

Kenneth Willcox, Chair
1988 Allocations Committee

KW/mh

Enclosure



July 18, 1988

United Way

404 South Eighth Street
Minneapolis, Minnesota 55404-1084
(612) 340-7400

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flo h. wiger
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Laura Waterman Wittstock
James C. Colville

Executive Director

James C. Colville

Irene Gomez-Bethke, President
Centro-Legal, Inc.
4649 Decatur Avenue North
New Hope, MN 55428

Dear Ms. Gomez-Bethke:

The purpose of this midcycle report is to summarize the United Way Allocation Team's observations, comments, and questions about your agency and programs at the mid-point of our review cycle. Please forward your response directly to all team members with 2 copies to United Way staff by August 26, 1988.

This report is an opportunity to continue our dialogue concerning your agency and its programs. Your response to the midcycle report enables you to address listed issues and further discuss your plans for future funding before the Team makes its final funding recommendations.

The mid-year performance rating is based on 1987 year-end program performance, the response to Step 1 Expectations, any other appropriate subsequent data, and liaison input about site visits.

The team will consider your funding request and base its final recommendations on three principle factors:

- o Effectiveness of the program in meeting objectives
- o Priority of the problem(s) addressed by each program
- o Competition for available funds

Allocations volunteers and staff sincerely appreciate your efforts to date, and are committed to working with you to understand your programs and proposal for future funding. Team members may continue to visit your agency through early September. If you have specific questions, please feel free to call Team members or United Way staff.

Sincerely,

Mark Lund

Mark Lund, Team Leader
Panel X, Team B

MLba

c.c. Martin Diaz, Chief Legal Officer
Donn Vargas, Administrator
Panel X-B Members

enclosures: Updated Panel Roster
Step 3: Midcycle Report(s)



July 18, 1988

United Way

404 South Eighth Street
Minneapolis, Minnesota 55404-1084
(612) 340-7400

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flo h. wiger
Kenneth A. Willcox

Laura Waterman Wittstock
Executive Director

James C. Colville

Irene Gomez-Bethke, President
Centro-Legal, Inc.
4649 Decatur Avenue North
New Hope, MN 55428

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The team will consider your funding request and base its final recommendations on three principle factors:

- o Effectiveness of the program in meeting objectives
- o Priority of the problem(s) addressed by each program
- o Competition for available funds

Allocations volunteers and staff sincerely appreciate your efforts to date, and are committed to working with you to understand your programs and proposal for future funding. Team members may continue to visit your agency through early September. If you have specific questions, please feel free to call Team members or United Way staff.

Sincerely,

Mark Lund

Mark Lund, Team Leader
Panel X, Team B

MLba

c.c. Martin Diaz, Chief Legal Officer
Donn Vargas, Administrator
Panel X-B Members

enclosures: Updated Panel Roster
Step 3: Midcycle Report(s)

Call Mark



November 29, 1988

United Way

404 South Eighth Street
Minneapolis, Minnesota 55404-1084
(612) 340-7400

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Executive Director

James C. Colville

Irene Gomez-Bethke, President
Centro-Legal, Inc.
4649 Decatur Ave. No
New Hope MN 55428

Dear Ms. Gomez-Bethke:

The United Way Board of Directors approved the allocations to agency programs on November 29, 1988. We are pleased to notify you that United Way funding for your programs in 1989 is as follows:

PROGRAM	1989 UNITED WAY ALLOCATION
PROYECTO JUSTICIA	\$ 30,766
TOTAL ALLOCATION	\$ 30,766

The final allocation to your program(s) is the product of many factors: volunteer visits to your program(s), priority problem and target population served, competition for limited funds and volunteer review of budget, program performance reports, and proposed budget information. Detail of our funding rationale and a summary of United Way's 1989 expectations of your program(s) are attached.

The volunteers who reviewed your agency and program(s) are prepared to discuss their decisions and observations with you. If you desire further clarification after you have reviewed the written rationale, we ask that you write to your panel chairperson no later than January 13 detailing the issues you wish to review.

Allocation decisions should be viewed as final except in the most unusual situation. If, after discussion with panel volunteers, you wish to ask for reconsideration of a program allocation, please write a letter to me no later than February 3, 1989. Keep in mind that there are three grounds for reconsideration: 1) material new information that would have resulted in a materially different decision came to light after October 7, 1988; 2) material errors in information submitted by your agency or its restatement by United Way affected the allocation decision; 3) United Way miscalculated your allocation amount. Reconsideration requests will be resolved by March 31, 1989.

Receipt of your agency's full allocation is, of course, dependent upon the continuing delivery of the funded program services throughout 1989. Article II, Sections 1-5 of United Way's By-Laws detail the policies which govern the distribution of funds to agencies.

Centro-Legal, Inc.
November 29, 1988
Page 2

All agencies will receive 12 equal monthly allocation payments beginning in January for the period January 1 - December 31, 1989. If you wish a different payment plan because your agency expenditures are not equal each month, a request and a detailed cash flow plan should be submitted to United Way's Allocations Department by February 1, 1989. Revised and approved payment plans will begin in February.

Thank you for all your extra efforts this year. I know we all look forward to another year of high quality human services for the greater Minneapolis community.

Sincerely,



Kenneth A. Willcox, Chair
United Way Allocations Committee

KAW/gw

cc: Martin Diaz, Chief Legal Officer



United Way

404 South Eighth Street
Minneapolis, Minnesota 55404-1084
(612)-340-7400

December 1, 1987



100 YEARS
OF CARING

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Executive Director

James C. Colville

Irene Gomez-Bethke, President

Centro Legal, Inc.

4649 Decatur Avenue North
New Hope MN 55428

Dear Ms. Gomez-Bethke:

The United Way Board of Directors approved allocations to agency programs on December 1, 1987. We are pleased to notify you that United Way funding for your programs in 1988 is as follows:

PROGRAM	1988 UNITED WAY ALLOCATION
Projecto Justicia	\$ 30,016
TOTAL ALLOCATION	\$ 30,016

The final allocations to your programs is the product of many factors: volunteer visits to your programs; priority problem and target population served; and program competition for limited funds within a United Way priority category; and volunteer review of budget, program performance reports, and proposed budget information. Detail of the rationale for these allocations and a summary of United Way's 1988 expectations of your programs is attached.

The panel, which reviewed your agency and programs, is prepared to discuss these decisions and observations with you. If you desire further clarification of your allocation after you have reviewed the written allocations rationale, we ask that you write to your panel chairperson no later than January 15 detailing the issues you wish to review.

The allocations decision should be viewed as final except in the most unusual situation. If, after discussion with your panel, you wish to ask for reconsideration of a program allocation, write a letter to me no later than February 5, 1988. Keep in mind that there are three grounds for reconsideration: 1) material new information that would have resulted in a materially different decision came to light after October 9, 1987; 2) material errors in information submitted by your agency or its restatement by United Way which affected the allocations decision; 3) United Way miscalculated your allocation amount. Reconsideration requests will be resolved by April 1, 1988.

It brings out the best in all of us.

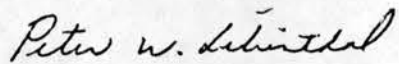
Centro Legal, Inc.
December 1, 1987
Page 2

Receipt of your agency's full allocation is, of course, dependent upon the continuing delivery of the funded program services throughout 1988. Article II, sections 1-5 of United Way's By-Laws detail the policies which govern the distribution of funds to agencies.

All agencies will receive 12 equal monthly allocation payments beginning in January for the period January 1 - December 31, 1988. If you wish a different payment plan because your agency expenditures are not equal each month, a request and a detailed cash flow plan should be submitted to the Allocations Department by February 1, 1988. Revised and approved payment plans will begin in February.

Thank you for all your extra efforts this year. I know we all look forward to another year of high quality human services for the greater Minneapolis community.

Sincerely,



Peter W. Lilienthal, Chairperson
The Allocations Committee

PL/kp

cc: Martin Diaz, Chief Legal Officer
Donn J. Vargas, Administrator

T____ P____ AC__X__

STEP 4: FUNDING RECOMMENDATION: Completed by Program Liaison and
Submitted to Staff at Team Funding
Meeting

AGENCY: Centro Legal

PROGRAM: Projecto Justicia - Legal Services

PROBLEM(s)/PRIORITY: Discrimination

EVALUATION STATUS: Level 1

FINAL PROGRAM ASSESSMENT: SATISFACTORY

DISCUSSION/RATIONALE:

- o Evaluation status Level 1 is affirmed for this program.
- o Program performance reports have been revised. Preliminary data indicates program is meeting outcome and service level objectives.
- o Program clients: 76% low income households (below \$10,000) 66% minority (45% hispanic).

1987 Allocation: \$29,213

1988 Request: \$45,000 Change: 54% Dollar Amount Change: \$15,787

1988 Recommendation: \$30,016 Change: 2.75% Dollar Amount Change: \$803

Funding Status: (Circle One) new, expand, replacement, maintain reduce

Overall Funding Rationale: (tie to quality assessment, funding status, and quantify how funds will be used):

2.75 percent increase to maintain this program according to Allocations guidelines for program assessment rating.

1988 Expectations Due February 12, 1988:

(Tasks to be completed/issues to be resolved in 1988)

1. Maintain program operations as described.
2. Please submit full year 1987 performance results on outcomes, service levels, and demographics.



United Way

404 South Eighth Street
Minneapolis, Minnesota 55404-1084
(612) 340-7400

1989 Board of Directors

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Executive Director

James C. Colville

July 20, 1989

Ms. Irene Gomez-Bethke, President
Centro-Legal, Inc.
4649 Decatur Avenue North
New Hope, MN 55428

Dear Ms. Gomez-Bethke:

The purpose of this midcycle report is to summarize the United Way Allocations team's observations, comments, and questions about your agency and programs at the mid-point of our review cycle. Please forward your response directly to all team members with two copies to United Way staff by July 31, 1989.

This report is an opportunity to continue our dialogue concerning your agency and its programs. Your response to the midcycle report enables you to address listed issues and further discuss your plans for future funding before the Team makes its final funding recommendations.

The mid-year performance rating is based on 1988 year-end program performance, the response to Step 1 Expectations, any other appropriate subsequent data, and liaison input from site visits.

We have attached our Financial Risk Assessment Summary Sheet. This sheet is the team's feedback to you. United Way believes that it raises relevant issues about an agency's risk potential. The assessment is done primarily by our volunteer accountant liaison and is completed by the entire allocations team. Analysis is based on agency-wide reports. The overall Risk Assessment results from the team's judgment about the individual risk factor ratings (listed A - I). Most factors will be rated "Average" without comment. If "Moderate", "High", or "Very High" is checked, we will make specific comments.

The team will consider your funding request and base its final recommendations on three principle factors:

- o Effectiveness of the program in meeting objectives
- o Priority of the problem(s) addressed by each program
- o Competition for available funds

Allocations volunteers and staff sincerely appreciate your efforts to date, and are committed to working with you to understand your programs and proposal for future funding. Team members may continue to visit your agency through early September. If you have specific questions, please feel free to call Team members or United Way staff.

Sincerely,

Mark Lund
Mark Lund, Team Leader

c.c. Martin Diaz, Chief Legal Officer; Donn Vargas, Administrator
Panel C, Team 3 Members

Enclosures: Updated Panel Roster, Step 3: Midcycle Report(s),
Financial Risk Assessment Summary Sheet

It brings out the best in all of us.

1989 UNITED WAY PROGRAM ASSESSMENT SYSTEM (PAS)
STEP 3: MIDCYCLE REPORT

AGENCY: CENTRO LEGAL

PROGRAM: Proyecto Justicia - Legal Services

PROBLEM(s)/PRIORITY: Discrimination

EVALUATION STATUS: Level 1 - outcomes and services

MIDYEAR PROGRAM PERFORMANCE RATING; Not Applicable

DISCUSSION/COMMENT:

The agency is going through a transition period, with new Executive Director and staff attorney in this program. Team members will reschedule the cancelled site visit to review questions and answers discussed in the memorandum submitted June 8, 1989.

1988 YEAR END PERFORMANCE DATA COMMENT:

Program exceeds outcome and service level objectives and 1987 results.

Total number of clients served increased by 41, from 238 in 1987 to 279 in 1988.

EXPECTATIONS DUE JUNE 2, 1989:

1. Maintain program as described.
2. Explain the decreases described in 1989 program description: Program in transition - new Executive Director and program director. 1989/90 projections are more realistic.
 - 220 clients will receive direct representation (down from 238 clients measured in 1988 performance reports and 279 actually served).
 - 100 individuals will be provided legal education through at least 3 seminars (down from 120 participants measured in the 1988 performance report and 200 actually served in 8 seminars).

ADDITIONAL QUESTIONS - RESPONSE DUE JULY 31, 1989:

1. Please describe the specific increases in outcomes and services that are projected if the expanded funding of \$7,875 for 0.3 FTE attorney is allocated in 1990.
2. Provide copies of the 1988 audited financial statements and provide support for funding sources that retired the Internal Revenue Service debt.



United Way

404 South Eighth Street
Minneapolis, Minnesota 55404-1084
(612) 340-7400

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James C. Colville

TO: Irene Gomez-Bethke, President
Centro-Legal, Inc.

FROM: Mark Lund, Panel C-3 Team Leader

DATE: March 20, 1989

As in previous years, United Way is beginning its review of funded programs. The enclosed materials set the stage for that review. We follow a four step process called the Program Assessment System which begins in April and finishes with funding decisions in November.

The four steps are designed to make our allocations process as fair and objective as possible. They focus our evaluation on four areas: outcome objectives, service level objectives, target populations, and barriers to service. The four steps are:

Step 1: Expectations: (March) identifies issues which will be addressed the volunteer liaison site visit. (green attachment)

Step 2: Program Assessment Worksheet: for Program Assessment Ratings and is used on site visits. (blue attachment)

Step 3: Program Assessment Summary: (July) mid-cycle report to the agency which states the preliminary Program Assessment Rating and issues for further discussion prior to funding decision making.

Step 4: Funding Recommendations: (November) gives a final Program Rating, the level of funding for the next two years, and the rationale for the rating and funding recommendation.

The 1989 team of United Way allocations volunteers that will work with your agency is committed to learning as much as we can about your programs. The first step in our review process will be a meeting of the team and your agency representatives on:

DATE: Tuesday, April 25, 1989

TIME: 2:45 - 3:15 p.m.

PLACE: United Way Service Center, Minneapolis Room, 1st Floor
404 South 8th Street, Minneapolis

The purpose of the meeting is to introduce ourselves, the allocations team, to your program staff and to clarify the team's "expectations" as stated in the Program Assessment System - Step 1: Expectations. (green attachment). In addition to discussion, we require written comments from your agency on the issues raised.

Please mail your written response to Step 1: Expectations directly to team members with a copy to United Way staff by the due date.

The United Way volunteers and their assignments are attached. We have assigned allocations volunteer(s) to review each United Way funded program at your agency. We look forward to working with you this year.

MLba

c.c. Martin Diaz, Chief Legal Officer, Donn J. Vargas, Administrator

enclosures: Step 1: Expectations
Allocations Team Roster
Step 2: Program Assessment Worksheet

It brings out the best in all of us.



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flo h. wiger

Kenneth A. Willcox

Laura Waterman Wittstock

Executive Director

James C. Colville

April 25, 1988

Irene Gomez-Bethke, President
Centro-Legal, Inc.
4649 Decatur Avenue North
New Hope, MN 55428

Dear Ms. Gomez-Bethke:

I chair the team of United Way allocations volunteers that will work with your agency this year. We are committed to learning as much as we can about your programs, and the first step will be a meeting of the team and your agency representatives on:

DATE: May 6, 1988
TIME: 12:00 - 1:00 p.m.
PLACE: Centro Legal
2929 4th Avenue South - Suite M

The purpose of the meeting is to clarify our organizations' objectives for this year's United Way review cycle. United Way's objectives are stated in the attached Program Assessment System - Step 1: Program Expectations Forms (green attachment). This meeting is an opportunity for you to discuss your operations for 1988 and hopes for 1989 as well as to present an overview of your whole agency.

The Program Assessment System has four steps. Steps 1 & 2 are used by allocations volunteers on visits to your agency's programs. Steps 3 & 4 are used by allocations volunteers in United Way's decision making phase. Step 1 contains program expectations which are intended to focus our discussion with you on matters that will directly affect our 1989 funding decisions. The expectations also set a date when your written comments on the issues raised are due. Please be attentive to these dates.

PLEASE MAIL YOUR WRITTEN RESPONSE TO STEP 1 EXPECTATIONS DIRECTLY TO TEAM MEMBERS WITH A COPY TO UNITED WAY STAFF BY THE DUE DATE.

Step 2: Program Assessment Worksheet (blue attachment) contains three basic items which United Way uses to assess all programs: program outcomes, service levels and client demographics. Please be prepared to discuss each of these when your allocations volunteer visits their assigned program. As you know, the United Way's schedule is short, with allocations decisions to be made in mid-September. To make the best use of everyone's time we have assigned an allocations volunteer to each agency program. The United Way volunteers and their assignments are attached.

We look forward to seeing you and working with you this year.

Sincerely,

Mark Lund
Mark Lund
Team Leader X-B

c.c. Martin Diaz, Chief Legal Officer; Donn Vargas, Administrator
Panel Leadership, Team and Staff



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April 26, 1988

Irene Gomez-Bethke, President
Centro-Legal, Inc.
4649 Decatur Avenue North
New Hope, MN 55428

Dear Ms. Gomez-Bethke:

At it's April 26th meeting, United Way's Board of Directors approved the Allocations Committee's proposal to implement biennial allocations and program review. Approximately one-half of the participating agencies will receive biennial allocations beginning in 1989 (for 1989 and 1990) and the remaining one-half will begin in 1990 (for 1990 and 1991).

Your agency is scheduled to begin receiving biennial allocations in 1990 and its biennial review will be during 1989.

Several factors influenced our decision on which year an agency would begin receiving biennial allocations. The most important factor was the agency's request. We were able to honor about 75% of these. Another important factor was ease of administering the biennial process and the necessary United Way panel structure and staff organization. Other factors included maintaining agency-United Way volunteer continuity, providing for maximum potential for United Way volunteer retention and maximizing our ability to review like agencies that address similar community problems at the same time.

The biennial review process contains the same major provisions that the Council of Agency Executives developed and recommended during 1987. These are described in the attached "Biennial Allocations & Program Review". We see this year's transition to biennial allocations operating with minimum changes in the usual allocations review.

- o Agencies scheduled to receive biennial allocations beginning in 1990: proceed through the usual allocations review this year with no change at all.
- o Agencies scheduled to receive biennial allocations in 1989: submit a two year request to United Way on June 3, 1988 using the same budget materials we have used in the past.

Our goal for the biennial process is to provide stable funding for quality programs while increasing our process efficiency for agencies and United Way volunteers and staff. We believe that biennial review takes a large step in this direction.

We have received broad support for this concept from participating agencies and United Way volunteers and staff. It is a big step and we thank you for your cooperation. We look forward to your continued support during the two year period of transition to biennial allocations.

Sincerely,

Ken Willcox

Ken Willcox, Chair
1988 Allocations Committee

cc: Martin Diaz, Chief Legal Officer; Donn Vargas, Administrator



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404 South Eighth Street
Minneapolis, Minnesota 55404-1084
(612)-340-7400

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Executive Director

James C. Colville

December 1, 1987

Irene Gomez-Bethke, President
Centro Legal, Inc.
4649 Decatur Avenue North
New Hope MN 55428

Dear Ms. Gomez-Bethke:

The United Way Board of Directors approved allocations to agency programs on December 1, 1987. We are pleased to notify you that United Way funding for your programs in 1988 is as follows:

PROGRAM	1988 UNITED WAY ALLOCATION
Proyecto Justicia	\$ 30,016
TOTAL ALLOCATION	\$ 30,016

The final allocations to your programs is the product of many factors: volunteer visits to your programs; priority problem and target population served; and program competition for limited funds within a United Way priority category; and volunteer review of budget, program performance reports, and proposed budget information. Detail of the rationale for these allocations and a summary of United Way's 1988 expectations of your programs is attached.

The panel, which reviewed your agency and programs, is prepared to discuss these decisions and observations with you. If you desire further clarification of your allocation after you have reviewed the written allocations rationale, we ask that you write to your panel chairperson no later than January 15 detailing the issues you wish to review.

The allocations decision should be viewed as final except in the most unusual situation. If, after discussion with your panel, you wish to ask for reconsideration of a program allocation, write a letter to me no later than February 5, 1988. Keep in mind that there are three grounds for reconsideration: 1) material new information that would have resulted in a materially different decision came to light after October 9, 1987; 2) material errors in information submitted by your agency or its restatement by United Way which affected the allocations decision; 3) United Way miscalculated your allocation amount. Reconsideration requests will be resolved by April 1, 1988.



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OF CARING

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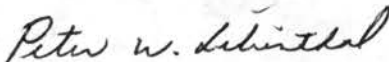
Centro Legal, Inc.
December 1, 1987
Page 2

Receipt of your agency's full allocation is, of course, dependent upon the continuing delivery of the funded program services throughout 1988. Article II, sections 1-5 of United Way's By-Laws detail the policies which govern the distribution of funds to agencies.

All agencies will receive 12 equal monthly allocation payments beginning in January for the period January 1 - December 31, 1988. If you wish a different payment plan because your agency expenditures are not equal each month, a request and a detailed cash flow plan should be submitted to the Allocations Department by February 1, 1988. Revised and approved payment plans will begin in February.

Thank you for all your extra efforts this year. I know we all look forward to another year of high quality human services for the greater Minneapolis community.

Sincerely,



Peter W. Lilienthal, Chairperson
The Allocations Committee

PL/kp

cc: Martin Diaz, Chief Legal Officer
Donn J. Vargas, Administrator

United Way of Minneapolis Area

MEMORANDUM

To Agency Executive Directors

From Anthony R. Wagner
Agency Division Chairman

Date May 7, 1986

Subject Breakfast for Contact Executives

*There:
for your info
DSV*

On Wednesday, June 4, at 7:30 am, there will be a kick-off breakfast for contact executives at the Decathlon Club, Olympia Room, in Bloomington. Last year many of your volunteers attended a similar breakfast and were able to provide a unique perspective of United Way services to the contact executives.

We would greatly appreciate it if you could please designate one volunteer who can attend this year's breakfast, as our guest, to represent your agency and get acquainted with the contact executives who will raise significant monies for the Minneapolis United Way.

Please R.S.V.P. by calling Wendy Howell (340-7560). We will need the name of your volunteer and their phone number to confirm their attendance. Please respond no later than Monday, May 26.

ARWwmh