



Irene Gomez-Bethke Papers.

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5/89

Completed by _____ Team 3 _____
Panel C
Date June 21, 1989

UNITED WAY

FINANCIAL RISK ASSESSMENT
SUMMARY SHEET

Agency: CENTRO LEGAL

Overall Risk Assessment: High
(See Overview)

Risk Factors	Average	Risk Assessment (See Overview)			Comments
		Moderate	High	Very High	
A. Circumstances		X			Declining Service Levels.
B. Personnel			X		Turnover of Executive Director and staff attorney
C. Accounting		X (*)			
D. Budgeting	X				
E. Revenue	X				
F. Expenses	X				
G. Liquidity	X				
H. Operating fund balance	X				
I. Other (list)					

INSTRUCTIONS: For each risk factor (A-H), check the most appropriate risk assessment considering the number of risk factors present, the degree of risk and any mitigating circumstances. Please record any additional comments such as whether the risks are nonrecurring, explainable or controllable.

(*) 1988 audit not completed.

STEP 1: EXPECTATIONS: Completed by United Way Staff and
Approved by Volunteers

AGENCY: Centro Legal

PROGRAM: Projecto Justicia - Legal Services

PROBLEM(s)/PRIORITY: Discrimination

EVALUATION STATUS: N/A

Change from previous year end (allocations letter) Yes X No
If yes, explain:

Program description is being revised and modified with the assistance of
United Way PDE Department.

1987 UNITED WAY ALLOCATION: \$29,213 % CHANGE FROM 1986: 2.5%

TOTAL PROGRAM INCOME: \$84,329 UNITED WAY % OF TOTAL INCOME: 34%

1987 EXPECTATIONS:

(Tasks to be completed/issues to be resolved in 1987.)

Expectations Met

1. 1987 revised budget has been received.
2. Program revision drafting sessions with PDE Department have been scheduled.

Expectations to be Met by June 5, 1987

1. Work with PDE to develop a revised program description and appropriate performance reports.

1986 YEAR END PERFORMANCE DATA COMMENT:

1. As per agreement with United Way staff, 1986 year-end performance report will not be required.

AGENCY RESPONSE/COMMENTS Due by June 5, 1987.

1990 UNITED WAY PROGRAM ASSESSMENT SYSTEM (PAS)

STEP 1: EXPECTATIONS: Completed by United Way Staff and
Approved by Volunteer Leadership

AGENCY: CENTRO LEGAL

PROGRAM: Proyecto Justicia - Legal Services

PROBLEM(s)/PRIORITY: Discrimination

EVALUATION STATUS: Level 1 - outcomes and services

1990 United Way Allocation: \$ 32,000 % Change from 1989: 4%

1989 YEAR END PERFORMANCE DATA COMMENT:

The program met or exceeded outcome and service level objectives. The total number of clients served was 231 (5% more than the 220 projected).

76% had annual incomes at 125% or below the federal poverty guidelines, 86% were racial or ethnic minorities, 68% Hispanic.

1990 EXPECTATIONS - RESPONSE DUE FEBRUARY 5, 1990:

1. Please submit 1988-89 year end program performance report for outcomes, service levels and client demographics. MET
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. Program description submitted with more ambitious performance measures.
3. During the review year, please work closely with team members on United Way's Financial risk Assessment and Agency Stability Assessment tools.

EXPECTATIONS - RESPONSE DUE MAY 25, 1990:

None

Discussion/Examples: (if "no" or "?", communicate immediately to United Way staff)

C. Program Performance

The Program Performance rating reflects volunteers' judgments about program performance based on Program Performance Reports, site visits, and other verbal and written communications with agencies. Three areas are reviewed: a) outcome objectives, b) service levels, and c) client demographics (which include high-risk target populations and impact on barriers to service). A rating of "S" or "Satisfactory" is the midpoint of a five-point quality assessment rating scale.

Rating Outcome and Service Level Objectives

Outcome and service level objectives should be realistic, set on the basis of factors such as prior program performance, staff size, similar programs, etc. A rating of "S" or "Satisfactory" is defined as meeting objectives plus or minus 10 percent.

<u>Rating</u>	<u>Definition</u>
E (Exceptional)	The program exceeds all or most of the described objectives. Objectives which are achieved but not exceeded are very few in number and do not detract from the overall outstanding performance of the program.
G (Good)	The program meets all, and exceeds some of the described objectives. Objectives which are exceeded are significant and clearly demonstrate performance above Satisfactory.
S (Satisfactory)	The program meets the described objectives. The program may exceed a few objectives, but overall it is operating at expected levels.
F (Fair)	The program fails to meet one or more of the described objectives. The program is operating at Satisfactory in some areas, but has at least one important shortfall to address. A plan is in place to achieve a rating of Satisfactory or better within an agreed upon time period (usually one year or less.)
W (Weak)	The program fails to meet one or more of the described objectives. The program either has problems which are so significant that achievement of a satisfactory rating within a reasonable time period is doubtful, or it was rated below Satisfactory in the prior evaluation and has not made adequate progress toward resolution of the issue.

Please circle the performance rating you believe most closely approximates your assessment.

- | | Weak | Fair | Satisfactory | Good | Exceptional |
|-----------------------------|------|------|--------------|------|-------------|
| 1. <u>Outcome Objective</u> | | | | | |

Stated outcome objectives have been met.

W F S G E

Discussion/Examples: (For example, list outcome objectives that have not been met or have been exceeded; list performance measures that have been under or over projected based on comparison to the previous year.)

2. Service Level

Stated service levels have been met.

W F S G E

Discussion/Examples: (For example, list service level objectives which have been exceeded or not met; also list those where the projection is out of line with experience.)

3. Client Demographics

Client Demographics combine two priorities issues: target populations and barriers to services. Percentages for the following definitions refer to the unduplicated percent of total program clients who are members of at least one of the target population groups identified in the United Way Priority Problem Descriptions. Please circle the rating you believe most closely approximates your assessment.

Rating

Definition

E (Exceptional)

At least 85% of the clients are "target populations" identified in the United Way Priority Problem Description and the program demonstrates impact on "barriers to service" listed in that Description.

G (Good)

60-84% of program clients are "target populations" identified in the United Way Priority Problem Description and the program demonstrates impact on "barriers to service" listed in that Description.

- S (Satisfactory) 51-59% of program clients are "target populations" identified in the United Way Priority Problem Description and the program demonstrates impact on "barriers to service" listed in that Description.
- F (Fair) Less than 50% of program clients are "target populations" identified in the United Way Priority Problem Description. A plan is in place to increase the number of "target population" clients within a reasonable length of time (usually one year or less).
- W (Weak) Less than 50% of program clients are "target populations" identified in the United Way Priority Problem Description. A plan is not in place which will increase the number of "target population" clients within a reasonable length of time.

Discussion/Examples:

D. Overall Program Performance Rating

An overall program rating is made by combining the rating from each of the three separate program areas: a) outcome objectives, b) service level objectives, and c) client demographics. In computing the overall program rating, these three areas are weighted equally unless a compelling rationale can be made otherwise.

___ Weak ___ Fair ___ Satisfactory ___ Good ___ Exceptional

Discussion/Comments:

**TRANSMITTAL LETTER
CENTRO LEGAL, INC.
1990 AND 1991 BUDGET PROPOSALS**

INTRODUCTION:

Centro Legal, Inc. was incorporated as a non-profit community law office in August, 1981. Since its inception, Centro Legal has represented clients from the Hispanic and lower income communities in their efforts to obtain viable access to the judicial system in areas of importance to them. Centro Legal fulfills an important and unique role in the provision of legal services to the Hispanic population. Every person on Centro Legal's staff is bilingual and familiar with Hispanic culture. Centro Legal is the only law office in the State of Minnesota providing a wide range of civil legal services to the Hispanic population.

Our Minneapolis and St. Paul offices engage in legal work that directly, and dramatically, impacts on the lives of our clients. Proyecto Justicia's work in the area of family law often brings emotional relief and financial stability to families in turmoil. Our work in Immigration law has helped many individuals fulfill their dream of leading productive, stable lives in the United States. Additionally, we have helped reunite families; obtained employment authorization for individuals, allowing them to provide their families with a decent standard of living and escape economic exploitation; obtained political asylum for individuals fleeing persecution; and generally, provided high quality legal representation in the area of Immigration law to our clients. It is important to note that our services are not available elsewhere. I am proud to say that Centro Legal's representation has made a real difference in the lives of our clients and their respective families.

Centro Legal is currently a streamlined, efficient, and financially viable organization. The Chief Legal Officer handles a sizeable caseload as well as administrative responsibilities. In addition, Centro Legal's staff is comprised of two attorneys, a paralegal, and one full-time and one half-time secretary. Centro Legal's Minneapolis and St. Paul offices operate with a minimal support staff. It is my hope that computerization and skillful use of volunteers will allow Centro Legal's staff to continue to maintain a high caseload.

FUNDING REQUESTS FOR 1990 AND 1991.

In May of 1990, funding for Centro Legal's Immigration Legalization Project (ILP) will end. Phillips G. Gonzalez is Centro Legal's ILP attorney. Once funding for this position ends there is a very real possibility that Centro Legal will be reduced to a two attorney law office. We are requesting that the respective United Ways of Minneapolis and St. Paul expand funding of Proyecto Justicia in order to allow Mr. Gonzalez to become part of Proyecto Justicia and continue his valuable work with Centro Legal. Since ILP funding ends in May, 1990 we are asking the Minneapolis and St. Paul United Ways to respectively fund a 0.3 FTE attorney position. This will allow Centro Legal to expand its Proyecto Justicia program to meet the needs of its clients.

Our funding request for 1991 is for each of the United Ways to respectively fund a 0.5 FTE attorney position to do Proyecto Justicia casework. The demand for our services greatly exceeds our capacity to take cases. Due to our limited staff, we are forced to turn away clients with meritorious legal cases. This is a painful process for us, and painful, if not actually injurious, to the clients who

are turned away due to our lack of resources. Unfortunately, when Centro Legal turns away a prospective client, there is very little probability that alternate legal representation will be found. Mr. Gonzalez' services are desperately needed by Centro Legal's client base. The Hispanic community is the largest growing minority group in the State of Minnesota. Limited English language skills, cultural and financial barriers all interconnect to deprive many Hispanics of meaningful access to our judicial and administrative systems. Centro Legal is committed to providing access to the legal system to all of our clients. However, our capacity to accept new cases is directly related to our ability to fund attorney positions. Core support from the Minneapolis and St. Paul United Ways, for an expanded Proyecto Justicia attorney position, will allow Centro Legal to meet client needs with services, rather than rejection.

CONCLUSION

Centro Legal is a small organization. Our staff works very hard and they take great pride in their work. Our clients often find themselves in stressful situations (divorce, custody disputes, pending deportation, etc.) Consequently, it is imperative that our agency project an image of stability.

In April of this year, the Chief Legal Officer and a Proyecto Justicia attorney left their respective positions with Centro Legal to obtain employment in other states. In order to insure continued stability Centro Legal must be able to adequately fund its programs to allow attorneys to maintain realistic and manageable caseloads.

Our agency has accomplished a great deal given its limited staff and resources. Centro Legal is currently in a position to realize its enormous potential. We ask that the United Way acknowledge the excellent work we have done in recent past to insure fiscal integrity along with quality legal representation by funding Proyecto Justicia at a level that will permit us to expand our services to Proyecto Justicia's client base, during 1990 and 1991.



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United Way of Minneapolis Area
404 South 8th Street
Minneapolis, MN 55404

Non-profit
Organization
U.S. Postage
PAID
Permit No. 634
Minneapolis, MN

100132

IRENE GOMEZ-BETHKE
4649 DECATUR AVENUE NORTH
MINNEAPOLIS MN

55428

Robert W. Leslie
General Campaign Chairman
and the
Members of the 1986 Campaign Cabinet
cordially invite you to
Victory Dinner

for the 1986 United Way of Minneapolis Area Campaign

Thursday, November 6, 1986

Cash Bar 6:00 p.m.

Dinner/Program 7:00 p.m.

Dancing to Midnight Express follows

Great Hall
Radisson South Hotel
7800 Normandale Blvd.,
Bloomington, MN

RSVP by November 4 343-6155

Reservations not cancelled
24 hours in advance will be billed

\$21 per person

1990 UNITED WAY PROGRAM ASSESSMENT SYSTEM (PAS)
1990 FINAL PROGRAM REPORT

AGENCY: CENTRO LEGAL

PROGRAM: Proyecto Justicia - Legal Services

PROBLEM(s)/PRIORITY: Discrimination

EVALUATION STATUS: Level 1 - outcomes and services

FINAL ASSESSMENT: GOOD

DISCUSSION/COMMENT:

This program is making very good progress. The financial position of the agency has improved since last year and the overall assessment is steady. Team members appreciate the quick response to our requests for written materials and additional information. Good outreach and targeting to people of color especially the Hispanic population. Dramatic improvement in the program performance during the past year so that the program continues to meet or exceed outcome and service level objectives. Full and comprehensive response to midcycle questions supports the final assessment of a good rating.

1989 YEAR END PERFORMANCE DATA COMMENT:

The program met or exceeded outcome and service level objectives. The total number of clients served was 231 (5% more than the 220 projected).

76% had annual incomes at 125% or below the federal poverty guidelines, 86% were racial or ethnic minorities, 68% Hispanic.

EXPECTATIONS - RESPONSE DUE JUNE 13, 1990:

NONE

EXPECTATIONS - RESPONSE DUE AUGUST 31, 1990:

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? MET - Increased foundation support, IOLTA, LSAL and attorney's fees will provide funding through 1990.
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? MET - 50% are turned away because they have only received "open/close" representation.
3. Please submit January 1 - June 30, 1990 outcome and service level results. MET - 121 clients received legal advice or representation. Five seminars were attended by 120 persons.

1990 Allocation: \$32,000

1991 Request: \$44,492

% Change: 39.0% Dollar Change: \$12,492

1991 Recommendation: \$33,300

% Change: 4.1% Dollar Change: \$1,300

FUNDING STATUS: (circle one) New, Expand, Replace, On-going, Reduce

Projecto Justica - 2

OVERALL FUNDING RATIONALE:

\$1,300 - A 4.1% increase according to revised funding guidelines for the indicated program final assessment.

This program was recommended for expansion by the Allocations Panel. However, due to the campaign shortfall and extreme competition, we were unable to fund it. There is a possibility that funds may be restored to the 1991 allocations budget. In that event, the Allocations Committee chose this program as a likely recipient of the additional funds. You will be notified of United Way's final decision by April 1, 1991.

\$ 10,892 - To help support a .5 FTE attorney to serve 63 additional program clients.

ISSUES TO BE RESOLVED DURING NEXT REVIEW CYCLE:

NONE

BIENNIAL PROCESS

This program has been approved for Biennial Funding. The only program reports we will require in 1991 are 1990 complete year client demographics, service sites and program descriptors due February, 1991. Please continue to track program outcomes and service levels for a two-year (1990 and 1991) report due February, 1992.