

Education Mobilization Project

August/September 2010 Report to the Board

EDUCATION

- Community Impact staff and lead Education volunteers have developed timelines for creating specific tactics for our education plans. We have a conference call with UWW staff to discuss this in late September.
- Grad Now is preparing to launch it's first of five workgroups with the parent and family engagement workgroup. The initial step will be to support families in holding living room conversations in their homes to discuss the expectations parents have of themselves and of schools.
- We are celebrating the success of our two SEL sites achieving significant movement in their State of Ohio Report Card. Sherman Elementary School went from Academic Emergency to Academic Watch. East Side Central Elementary School jumped two spots, going from Academic Watch to Effective!
- SEL expansion: Martin Luther King Elementary has approved school-wide Social and Emotional implementation and Glenwood Elementary will vote next week.
- Bill is sitting on the committee Bob Vasquez is pulling together to discuss changes needing to take place within the district.
- Fran Lawrence and Bill have scheduled a meeting to talk about "Waiting for Superman" and the role the teachers' union plays.
 - To the best of our knowledge, "Waiting for Superman" will be at Levis on Oct. 22. We are discussing how best to promote the movie and what an event around it would look like.
- Several staff members attended WGTE's Early Learning Summit on Sept. 9.

MOBILIZATION

- United Way Worldwide came to Toledo on August 4-5.
 - We developed a work plan which we then narrowed to four areas in which we need to focus and make progress in this first performance cycle (August – Dec. 2010). The four areas integrate the work we need to do in mobilization, CRM, and consultative selling.
 - Community Conversations
 - Online Engagement
 - Education Plan
 - Data (what to collect, how and when to collect, storage/retrieval options, etc.)
 - Measurements are currently being created around these areas.
- We also had a conference call with the other nine mobilization United Ways and discussed the Campaign for the Common Good, Blue State tools (for online engagement), and success stories.
- We have completed three community conversations and have two more scheduled – a block watch group in North Toledo (Sept. 21) and a group of parents with children with disabilities (Sept. 30).
 - We are pulling themes out of the conversations and documenting them. These themes will be shared at follow-up meetings when we invite back people who participated in earlier community conversations. We decided not to move forward with any type of software at this point.

- We also conducted a community conversation with members of the Board who attended the Special Board meeting on Aug. 23. Themes from that meeting are attached.
- We are still in discussion about if and how we create innovation space, what that looks like, and how much it will cost.
- We held an all staff training Aug. 20 with a goal to increase knowledge of all staff on Mobilization, CRM, and Consultative Selling and how they are all intertwined. Based on the results of a pre and post-test as well as evaluation results, the goal was achieved. We also heard a number of positive comments about the day and the opportunity to staff to interact and learn more about the work of other departments.
- We continue to have bi-weekly phone meetings with our Harwood coach who is giving feedback on our work and advice on next steps.
- Our next meeting with UWW and the other United Ways will be the December 7 through December 9 in Alexandria, VA.

Staffing – see Budget below

Budget

The mobilization budget originally approved in March, 2010 was outside of our normal budget cycle and required separate reporting to the Board as part of the Mobilization Update. As discussed with the Executive Committee in April, mobilization is now an integrated part of what we do and will be reported in the normal course of business. Internal financial statements will be presented quarterly with budget to actual variances included for monitoring. Therefore, the monthly Mobilization Update will no longer include a Budget section.

Following is an update on mobilization costs incurred through August. This will be the final update provided in this format.

- Staffing/Salaries & Benefits:
 - Positions hired to date are \$22,000 under budget (excluding benefits), on an annualized basis, and include the following hires and upgrades: VP Community Engagement, Marketing/Communications Specialist, Community Engagement & Events Associate, Grants' Compliance Accountant & Donor Relationship Manager.
 - Two positions remain unfilled as we re-evaluate our needs and the proper approach to achieving our objectives related to internal volunteer efforts and Community Impact work. The annual budget for these positions is \$70,000 (excluding benefits).
- Technology:
 - We are deferring spending as budgeted, in the amount of \$50,160 for software and licenses to enhance our current system, until such time as we identify the most suitable software solutions.
 - Computer equipment budgeted at \$12,900 for new hires is projected to be on budget.
- Training:
 - Consultative Selling training in the amount of \$21, 000 was incurred as budgeted.
 - Training for new software, in the amount of \$5, 160, is deferred (see Technology above).
- Travel/Conferences/Meetings:
 - Expenses incurred to date are \$7,185 for UWW on-site visits and Harwood Lab training attended in Virginia in June. We anticipate spending in excess of budget for this line item; however, we expect to be within budget overall as a result of savings in other areas.
- Office Supply/Copier/Postage:
 - We anticipate spending in-line with budget projections.