



Update on Allocations Process

May 10 & 11, 2011

WHEN WE REACH OUT A HAND TO ONE, WE INFLUENCE THE CONDITION OF ALL. LIVE UNITED

Our goal today

Discuss the changes and
what they mean for you

The situation

1. Problem

Undesignated pool is declining at an alarming rate jeopardizing agency allocations and our six community goals

2. Solution

The community must collaborate more AND United Way of Metropolitan Atlanta must raise and allocate funds differently

Decline of the undesignated pool

- Stagnant campaign growth
- Shifting donor trends
- Generational differences

Campaign Totals... (in millions)

	2010-11* Campaign	2009-10 Campaign	2008-09 Campaign	2007-08 Campaign	2006-07 Campaign
Goal	\$80.2	\$79.3	\$82.0	\$81.2	\$78.8
Actual	\$80.2	\$78.7	\$80.5	\$81.2	\$78.8
Designated funds	\$36.1	\$32.2	\$30.1	\$26.1	\$24.3
Uncollectable expense (11.5%)	\$7.3	\$7.1	\$6.8	\$5.8	\$5.7
Remaining proceeds to be distributed	\$21.2	\$23.5	\$28.3	\$35.0	\$35.5
Percent designated	45%	41%	37%	32%	31%

*2010-2011 Projected

What donors are telling us

- Focus
- Collaboration
- Evidence of impact

What this means for you

- Grants based on competitive evaluation and performance
- Agency partners who align with collaborative goals and demonstrate impact will be funded
- Opportunities for multi-year grants for those who align and demonstrate impact
- First quarter grants paid in one installment
- We anticipate a reduction in agencies and programs that will be funded

Transparency & support

- Shared Funding Assessment tool prior to application due date
- Independent Review of program applications
- Conducted 16 specific & tailored investment trainings
- Allowed agency partners to switch from current focus area to a new area

Next steps

- Investment volunteers begin site visits (May – June)
- Agency partners notified of investment (July 22)

In summary...

- New structure will allow us to effectively address issues
- Changes will ensure:
 - Regional thinking and solutions
 - Collaboration with less duplication
 - Measurable change
 - Leveraged and focused resources

Questions?

Thank you.