



United Way
of Massachusetts Bay

Agency Survey Results

November, 2010

Background -- CEP Survey and Research Findings



Productive relationships require:

Positive interactions

- Comfort approaching the funder
- Responsiveness of funder staff
- Fairness of treatment

Clear and consistent communications

Understanding of agencies' goals and strategies

Helpfulness of selection and reporting processes

Expertise and external focus

2010 Survey



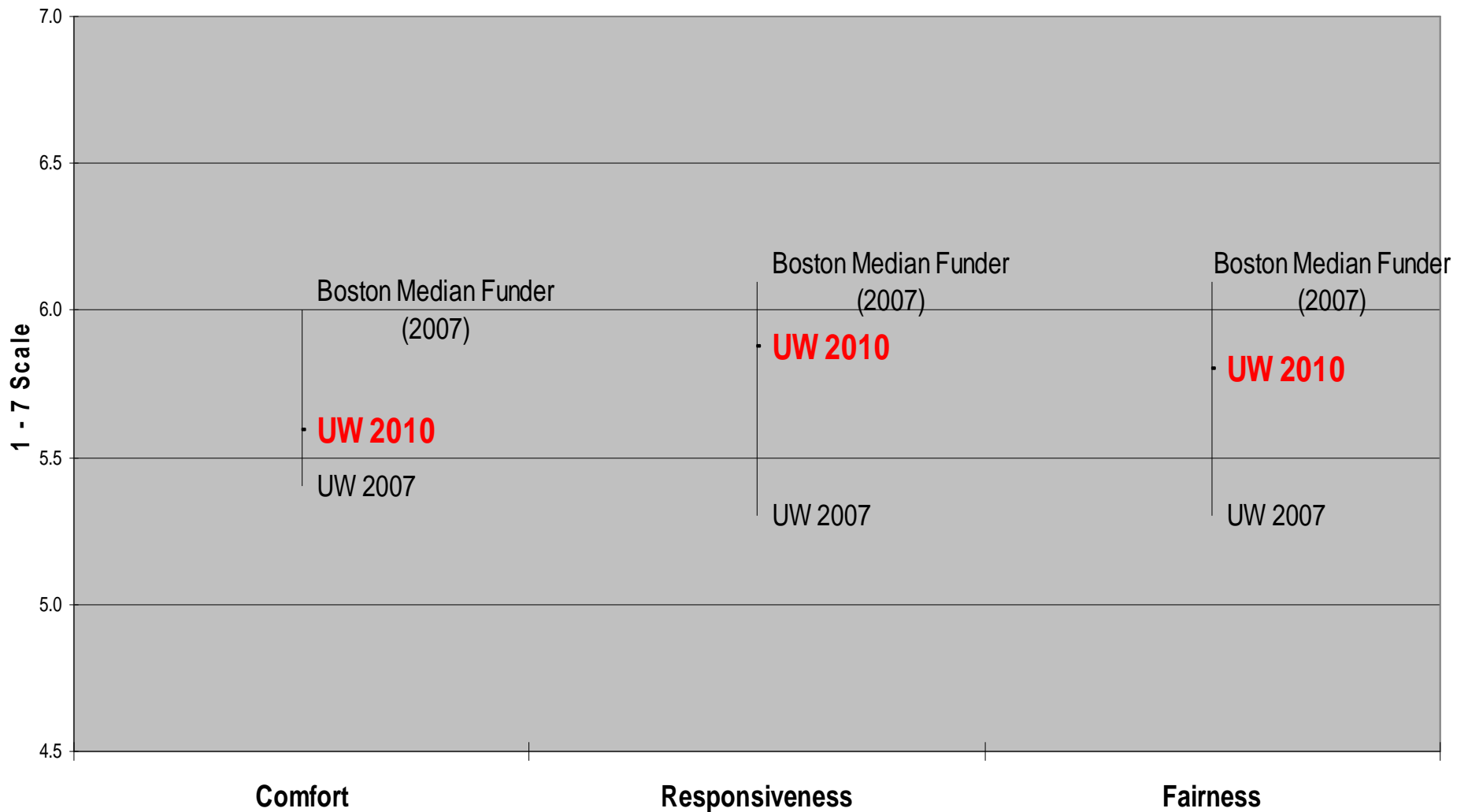
We self-administered the survey during May and June, with many of the same questions as three years ago

- 55 agencies responded, 35% response rate; 73% in 2007
- 44 have long standing relationships with UW
- Well-balanced by agency size and impact area
- Weighted more toward agencies experiencing funding reductions

Self-administration may have limited responses

Comparative data with other Boston or national funders is not available

Quality of Interactions



Agency Remarks – Quality of Interactions

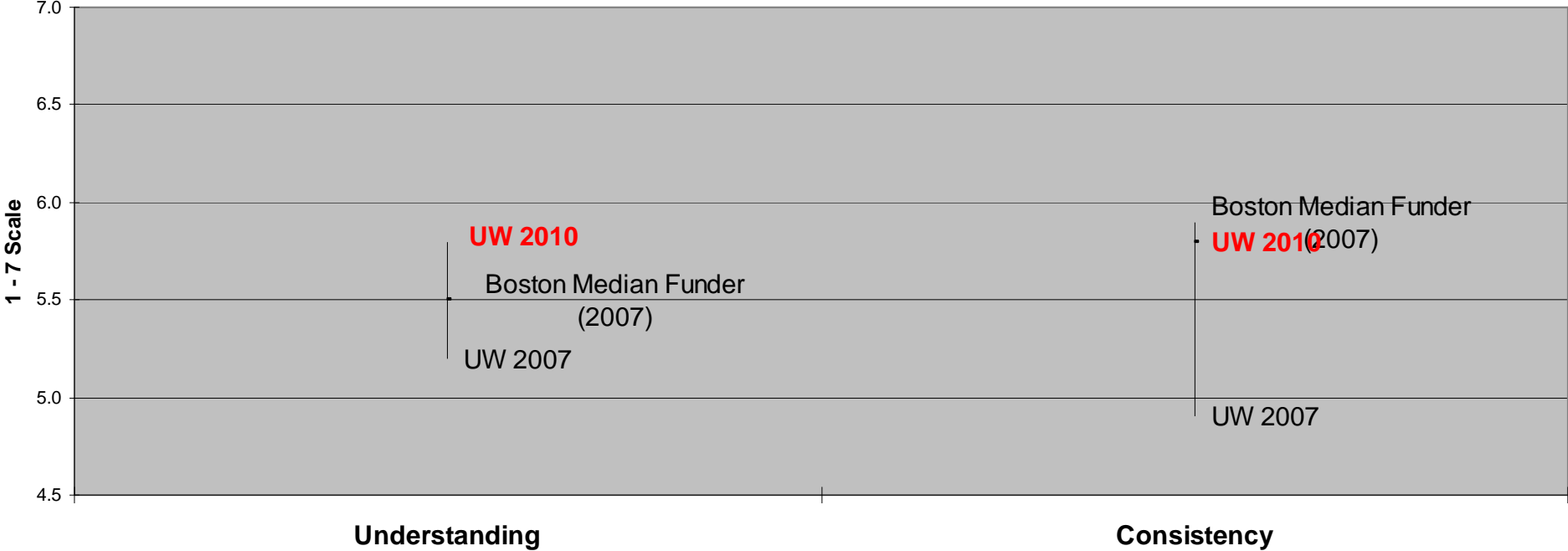


“Although I seldom elicit assistance from United Way staff, I have always been satisfied with their response.”

“Staff members respond to questions immediately and offer detailed guidance. They understand and respect our work and respond in ways that indicate that. Every interaction has been positive.”

“More contact to learn about our work would be helpful. Because our work is focused on organizing rather than direct service, we often feel like a square peg in a round hole”

Clarity of communications



Agency Remarks – Communication Clarity



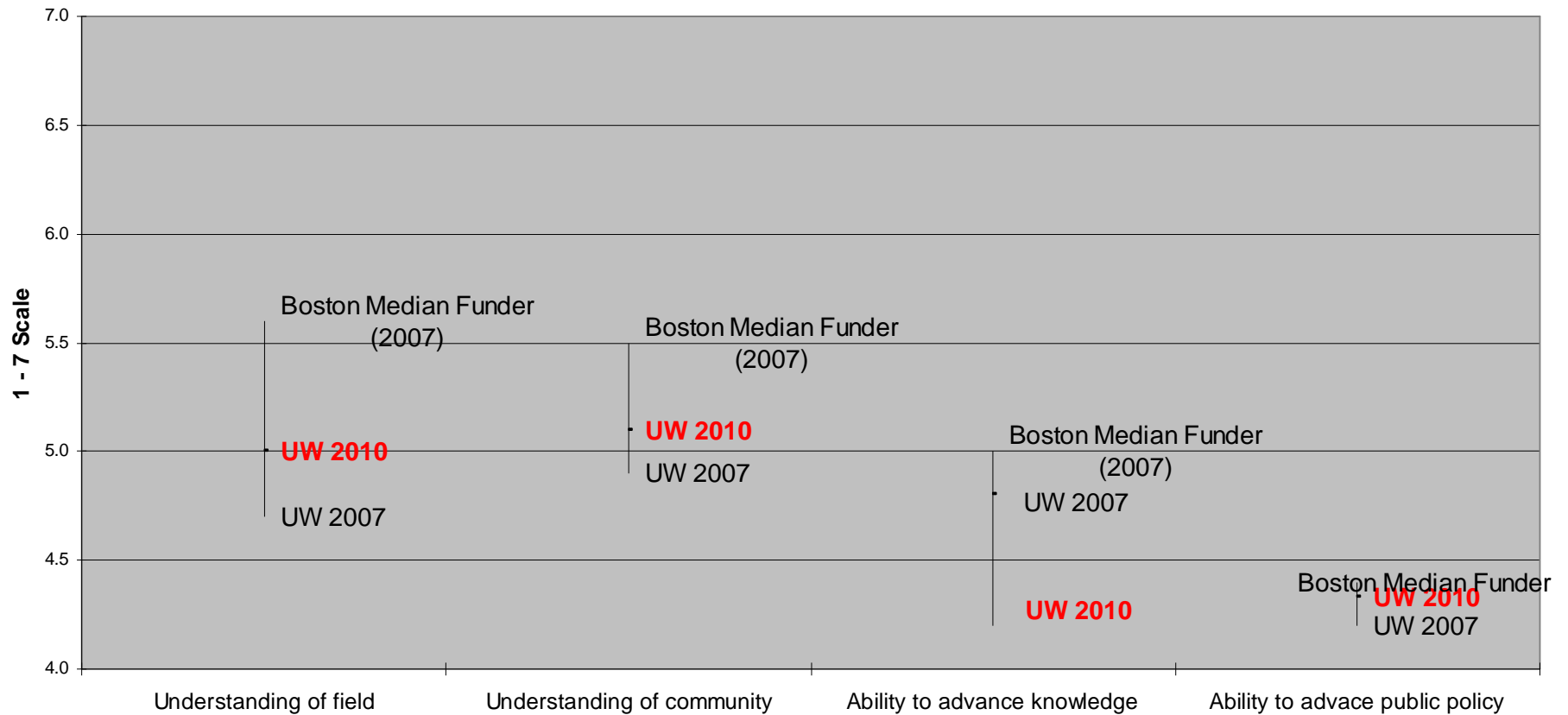
“Staff respond to questions immediately and offer detailed guidance. They understand our work and respond in ways that indicate that.”

“Training all in Boston, could be more personal contact with staff and impact partners in Merrimack Valley.”

“It would be helpful if we had more regular communication with our Relationship Manager in order to be kept abreast of any new initiatives and to receive feedback on our investment in our communities.”

“I don’t completely understand funding decisions... I have never understood how dollar amounts correlate with program type or program quality, etc.”

Expertise and External Orientation



Agency Remarks – Expertise and External Orientation



“United Way provides great support and resources and continues to keep itself informed of new theories and best practices.”

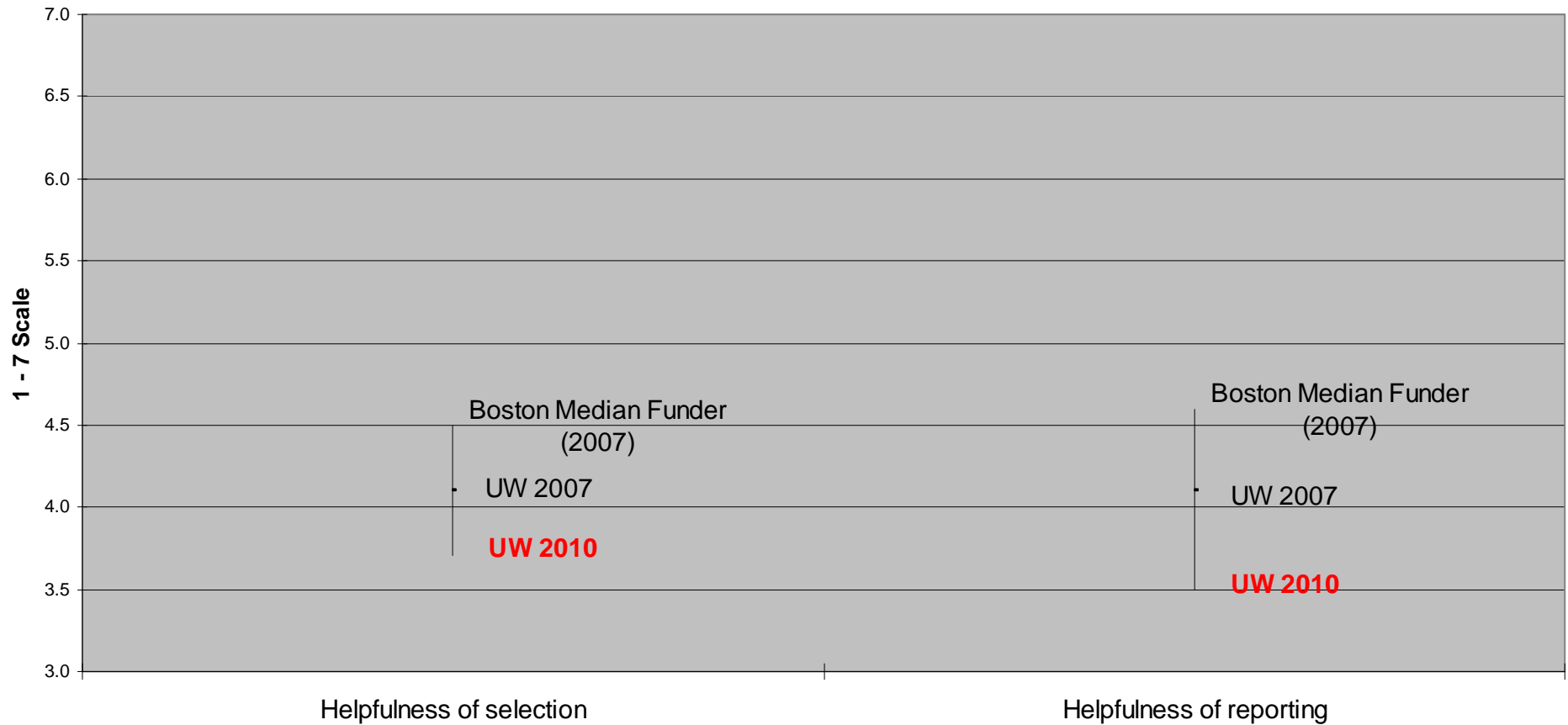
“United Way should take into account the overall impact an agency has on the communities it serves to the same extent it takes into account impact areas.”

“United Way is greatly respected”

“We rely on regular communications from UW an best practices, to pick up current trends and requirements we may integrate into our own activities”

“UW is a very good organization. Sometimes, I feel that the processes and information transmission reflect too much of a high-level academic, theoretical approach to helping people and a bit of a lack of real-world, hands-on experience... It can be a bit too top-down, rather than also learning from the providers who have that experience...”

Selection and reporting



Agency Remarks – Selection and Reporting



“We found the written guidelines for the RFP process to be cumbersome and unclear. “

“It’s great to have an RFP once every three years instead of every year. Also this year was notably simpler and more intuitive...”

“We are disappointed. UW now seems completely focused on numbers with little interest of our organization and its work.”

“UW needs to find meaningful ways to measure, define and reward impact than simply quantitative output.”

“RFP process was the MOST USER-FRIENDLY I have ever experienced in 20+ years of grant writing. The instructions were crystal clear; the questions were EXACTLY the questions that should have been asked... Answering the questions came very naturally to us, because they were virtually the same questions that we ask ourselves all the time in the process.”

Summary



What United Way does well:

- Trustworthy relationships -- agencies feel comfortable contacting us
- Provide consistent information over all communication methods
- Provide quality training sessions and written communications
- Perceived to be responsive and fair

Areas to work on:

- Better understanding of agency's strategies and goals – **minimum annual site visit; provide for broader view of agency work in RFP**
- Improve knowledge of fields and communities where agency operates – **site visits; develop closer connections with communities through agencies; focus on "connecting the dots"**
- Greater usefulness of the selection and reporting processes – **improve communication of funding strategies; increase focus on meaningful outcomes and additional context**