



Invest Early. Invest Wisely. Invest Together.

# Policy Committee

*February 15, 2019*



# Policy Committee Agenda

**8:00** Welcome, agenda, minutes

**8:10** Coaching Model Highlights

**8:20** What's New with our Executive Committee?

**8:35** Spotlight on Local Outcomes

**9:00** *Refresh the Message!*

**9:45** Upstream Self-Led Evaluation

**9:55** Public Comment

**10:00** Adjourn



# Our Meeting Objectives

- Revisit Successes
- Stewardship Plan
- Share stories



7

**Trainings Completed**

59

**Unique Participants**

41

**Unique Organizations**



“ The information and support is **invaluable**. One thing we took away was the **importance of program planning** that lends itself to evaluation. We now have a road map to... **effectively evaluate** our work. ”

- *707 Villages, Inc.*

“ I appreciated the time we were given to put **concepts into practice**... [This coaching model] also gave me a chance to **meet members of other nonprofits in the community**. ”

- *United Way of the Wine Country*

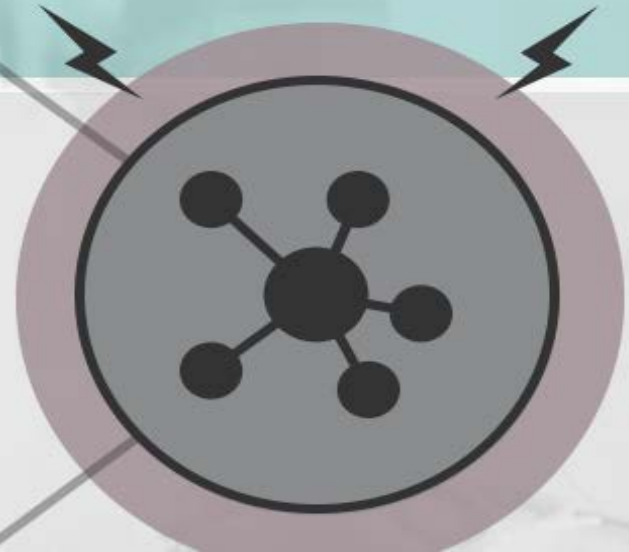


# Upstream Governance



Committee  
Name

Committee  
Charter



UU

# Upstream Steering Committee

EST. 2019

# Policy Committee Stewardship Plan







LEARNING *for* ACTION

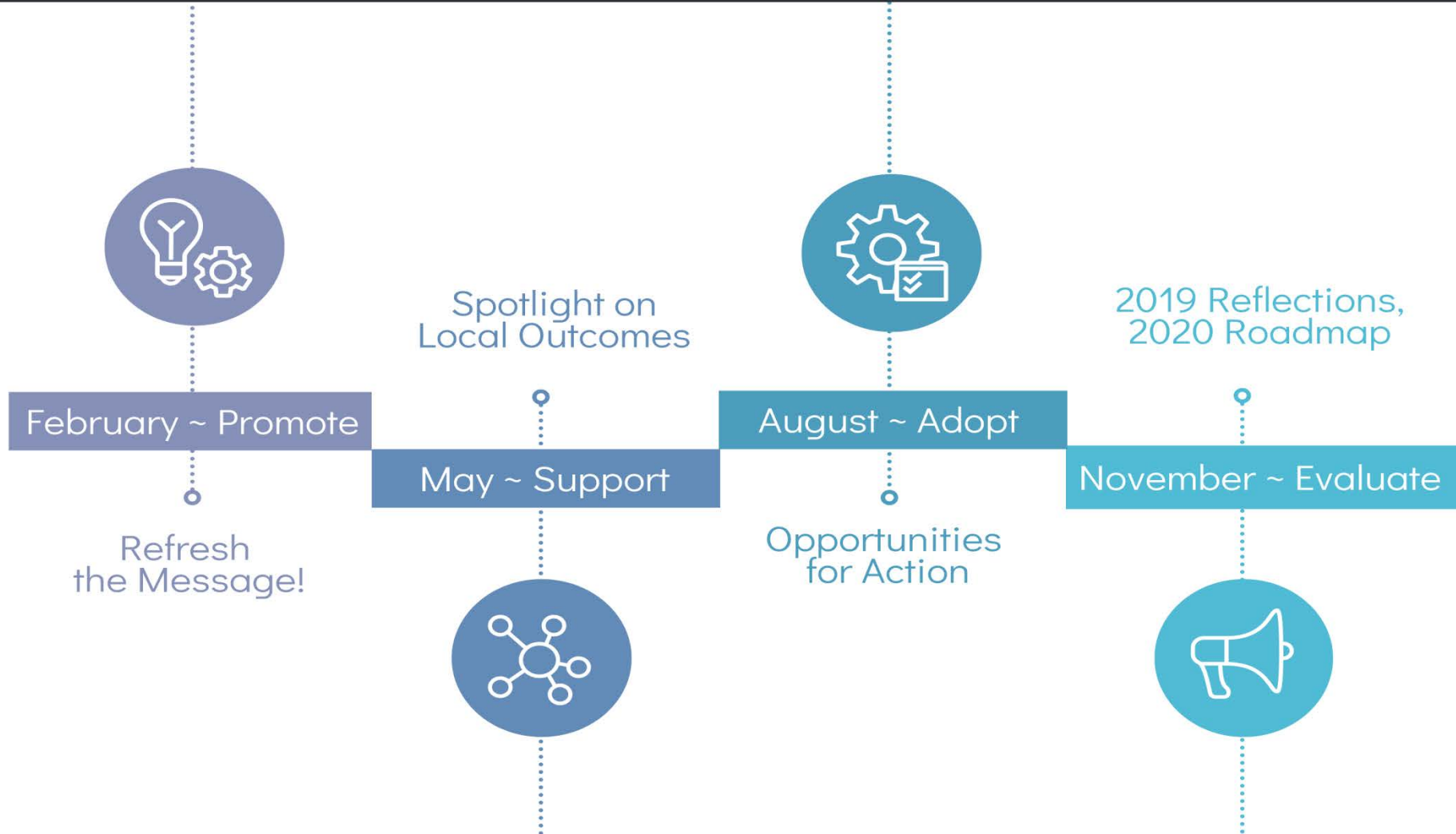
How does Upstream's  
Systems Change  
Evaluation continue to  
direct our journey?

# BOS Approved Priorities

- ✓ Expand shared measurement
- ✓ Adopt the Human Development Index (HDI) & deepen collaboration with Health Action
- ✓ Expand TA & reassess the Portfolio review process
- Expand outreach
- Promote active stewardship



# 2019 Stewardship Plan - 12 month sprint









## OUR MISSION

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Mentor Me empowers youth to reach their highest potential through mentoring and advocacy.

We envision a world where every child has a mentor.

## OUR HISTORY

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Mentor Me was founded in 2000 by a group of concerned parents at McNear Elementary School.

In 2007, our 501c3 status was approved.

Shortly thereafter, we received our first federal grant.

In 2014, we acquired the Mentor Me Cavanagh Rec Center, establishing an administrative and community center.

In 2018, Mentor Me implemented our data collection, analysis and reporting.



JACK W.  
**CAVANAGH**  
JR.  
RECREATION  
CENTER



## OUR TEAM

Board of Directors



Executive Director



Program Director

Marketing & Comms  
Director

Director of Operations



School Site Coordinators  
MMAT Caseworkers & Interns  
Area Supervisors  
Mentor Program Manager

Administrative Assistant  
HR/Payroll (outsourced)  
Facilities Administrator





## OUR WORK

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Mentoring For Success

*Connection*

*Growth*

*Contribution*







## OUR WORK

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Advocacy  
*Case Management*  
*Restorative Justice*  
*Academic Intervention*  
*Community Service Fulfillment*

## OUR WORK

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### Statistics

*368 Active Mentorships*

*24 Petaluma Area School Partners*

*45 Youth in Case Management*

*83 Youth Waitlisted*





## A LOVE STORY

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Chris and Jenny  
Natalia and Nancy

## BENEFITS OF COLLABORATION

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Evaluation Plan

Logic Model

Literature Review

Training Programs

Ongoing Accessibility & Support

Professional Networking & Partnership

Mentor Recruitment Opportunities  
within the Business Community







## ESSENTIAL PARTNERSHIP

Mentor Me would not have implemented a data collection and analysis program without the training and support received from Upstream Investments.

## CHALLENGES

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Lack of data systems

Lack of trained staff to perform data analysis

Lack of strategic planning vision

Intimidated by data

How to use the data to receive funding





Insert: Caption here and photo above.

**By:** Add Name of your Organization

**Who We Are**

Give your target audience a **short description of your program and its positive outcomes**. Briefly summarize the “Who, What, Where, When and How” of your success story. This section is short, and provides the reader a succinct overview of your program and its success. **Write this section last;** summarize what you’ve discussed in greater detail in other sections.

**What We Achieved**

Use this section to **describe your program’s key outcomes/achievements, and to share one compelling participant story**. **Start with a strong sentence to engage the reader.** Briefly describe 1 key program outcome/accomplishment using language that is understood by your target audience. For example, 30 families have found and kept stable housing for more than six month thanks to Z program funded by Y key donor.

**Then share a client or participant story that aligns with the key program outcome/accomplishment listed above.** Use easily understood, compelling language to demonstrate how the program has made a positive difference in a participant’s life. Combining a key outcome/accomplishment with a story is very effective. Research has found that stories that are personal and emotionally compelling engage more of the brain and are better remembered, than simply stating a set of facts or statistics. By combining 1 key outcome with a story your reader is more likely to remember your program’s key outcome and be invested in the continued success of your work.

*Include a client/supporter quote here that aligns with the compelling participant story shared under “What We Achieved.”*

-Client/supporter name, title, organization (if applicable).

# Impact Report

Who we are

What we achieved

How we did it

Why it matters

What is next



*Refresh the message!*



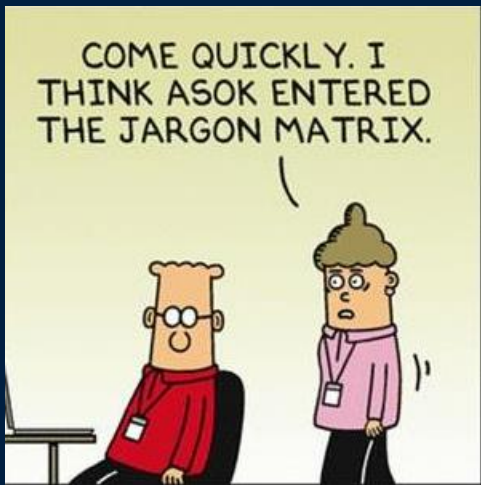
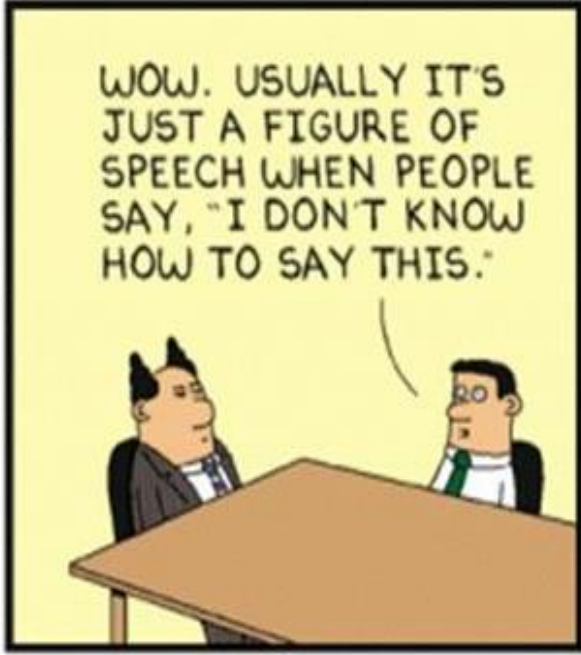




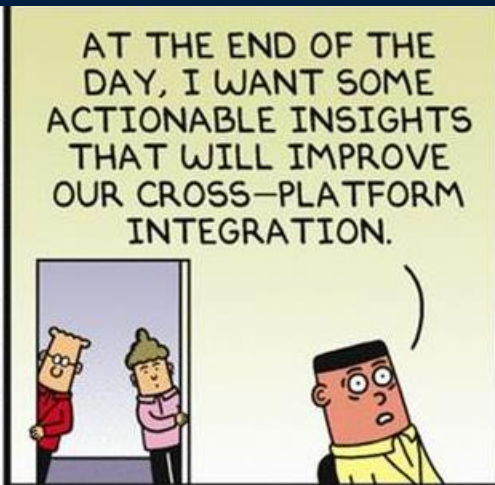
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## Warm-up Activity

(5 mins)

- ✓ In your words, define Upstream in 2-3 sentences.
- ✓ Are our Funders Guides and Toolkits useful?

## Breakout Exercise

(10 mins)

- ✓ Articulate reoccurring themes
- ✓ Pull together common words and user-friendly language

# Pod Discussions

(10 mins)

- ✓ How do you communicate the upstream story within your organization?
- ✓ Give examples of how you implement upstream strategies that we can include in our messaging.

# Upstream Stewardship Defined



**Promote  
Support  
Adopt**

- **Values and implementation of evidence-informed and prevention-focused models**
- **Upstream policies within organizations**
- **Upstream presentations and trainings**
- **Portfolio of Model Upstream Programs**
- **Investment shifts towards upstream approaches**
- **Partnerships to advance upstream principles**





# Public Comment



**Please limit comments to 3 minutes.**

# Thank you!



**Next Policy Committee Meeting:  
May 17, 2019  
8:00 – 10:00 am**