

# Investment Meeting Guide



## Attendees

**United Way does not have precise guidance on who should attend. A few pointers include:**

- **Primary Speaker:** It's most important to have someone who can effectively and efficiently speak to the work of the program. Sometimes this is development staff or the executive director but often it can be program staff. We have no preference on who it is and trust you to make the right decision for your program.
- **Executive Director (ED):** While not required, having the ED attend can demonstrate leadership buy-in and provide a broader perspective on the organization and its environment.
- **Board Members:** Board members are welcome, and some organizations find it helpful, but their attendance is not expected as we want to be mindful of their time.
- **Volunteers:** If possible, it is beneficial for program participants to speak at the meeting, as it gives volunteers direct insight into the program's impact. If you plan to have a program participant attend, we recommend you prepare them so they know what to expect and how to talk to their experiences.



## Common Volunteer Questions

- **Clarifications from the application:** Sometimes volunteers have specific questions that come up while reading applications. The most common part of the application to lead to questions are the budget/use of funds and performance measures.
- **Environmental context:** Volunteers often look to our partners to provide more information about the current state of affairs within the broader nonprofit and human services environment. They may ask you to provide more details about what you're seeing and experiencing while doing your work.
- **Technical questions:** These are questions to better understand what practices you're implementing to make your program effective. They will often be in reference to the specific element or field under which your program operates.

## Agenda

- **Introductions** 3 min
- **Program Overview** 7 min
  - Program overview 1 min
  - Partnerships 1 min
  - New developments 2 min
  - Challenges 2 min
  - Success story 1 min
- **Questions** 10 min

For agencies that have multiple programs being reviewed, this itinerary will vary a bit. Generally speaking, you'll have about 5-7 minutes per program overview and 10 minutes total for questions.

