

COMMUNITY INVESTMENT REVIEW PANEL VOLUNTEER POSITION DESCRIPTION



Community Investment Review Panel volunteers play a critical role in deciding how funds raised by United Way of Washington County are used to meet prioritized health and human service needs in the county. Review Panel volunteers are responsible for make funding recommendations that are then forwarded to the United Way Board of Directors for final deliberation.

Information about the three Impact Pillars and other United Way Initiatives may be found at the United Way of Washington County website, www.UnitedWayofWashingtonCounty.org.

COMMUNITY INVESTMENT PROCESS OVERVIEW

- STEP 1: Program provider (e.g., not-for-profit organization, agency or coalition fiscal agent) submits application (March 1, 2017 deadline).
- STEP 2: United Way's Director of Community Impact verifies that program provider has met eligibility requirements.
- STEP 3: Panel volunteers review program applications and individually complete preliminary Scoring Forms.
- STEP 4: Panel volunteers participate in Agency Panel Meetings (United Way staff facilitates).
- STEP 5: Panel volunteers participate in funding Consensus Meetings to allocate available funding.
- STEP 6: United Way's Community Impact Committee reviews Panel funding recommendations and advances finalized recommendations for United Way Board approval.
- STEP 7: United Way Board of Directors approves program funding. Agencies/coalitions are notified of program funding awards.

TIME COMMITMENT:

In May 2017 Allocations Committees will meet two times during the business day or in the evening hours depending on availability of members:

- 1) **Program/Agency Panel Meeting** will be held in May where each agency is available to answer questions and give more detail regarding their program, outcomes, etc... The typical length of a Program/Agency Panel Meeting is approximately 20-minutes with program representatives plus short Panel meetings before and after each presentation lasting 10-minutes each (35-40 minutes total per Visit). Multiple agencies will present during the **three or four hour** block of time.
- 2) A **two-three hour Consensus Meeting** will be held in May to finalize program funding recommendations.

ALLOCATIONS COMMITTEE VOLUNTEERS' PRIMARY ROLE & RESPONSIBILITIES

- Function as stewards of resources on behalf of the community by basing funding decisions on outcome results and alignment with United Way's community focus area goals.
- Review program applications and complete a preliminary Scoring Form for each application.
- Attend 1 Program/Agency Meeting to meet with program representatives to discuss program services. Update Scoring Forms based on additional information or clarifications obtained.
- Attend 1 Allocations Consensus Meeting to discuss merits of program applications, consider scoring criteria, and agree on scores for each program. At close of meeting the group will finalize funding recommendation to United Way's Community Impact Committee based on the consensus of the full Panels.

NOTE: Due to the number of applications, two Allocations Committees may be formed. Each Allocations Committee has its own portfolio of programs for which it conducts Program/Agency Panel Visits. The two ad hoc Committees gather for a combined final Consensus meeting to develop combined program funding recommendations.

CONFLICT OF INTEREST POLICY

Volunteers participating in the review of program providers' funding applications shall disclose any conflict of interest or relationships with applicants prior to any discussion of the issue(s) at hand and excuse themselves from participation in program funding recommendation decision-making for that specific program.

"Personal affiliations or relationships" of the individual or the individual's immediate family include, but are not limited to, ties through an individual's service as:

- Board member or officer of an program provider,
- Paid staff member of the program provider,
- Volunteer for a program provider not-for-profit organization or agency, or
- Currently utilizes the services offered by a program provider not-for-profit organization or agency.

Potential conflict of interest situations should be brought to the attention of United Way's Director of Community Impact and/or the Panel Chair as soon as practical.