

Community Investment Volunteer Expectations



United Way of Kankakee
& Iroquois Counties

A Community Investment Volunteer must be willing to fulfill the time commitment and should have a vested interest in the success of United Way's Partner Agencies as well as the accountability and integrity of United Way.

Individuals employed by applicant agencies are ineligible to serve as Community Investment Volunteers. Volunteers who serve on an applicant agency's board of directors or who are closely associated with an affiliate are ineligible to serve on the subcommittee assigned to evaluate that agency's application.

Volunteers will be asked to sign United Way's Code of Ethics to affirm their understanding and support of the standards included within that document.

Role and Responsibilities

A Community Investment Volunteer's role and responsibilities are:

- Make every effort to attend **all** meetings and agency presentations.
- Review grant applications to obtain a clear understanding of the agency's programs and operations.
- Report critical observations or concerns.
- Identify and recommend possible collaborations that might result in a more efficient delivery of service.
- Prepare recommendations for the Community Investment Committee to present to the United Way Board of Directors regarding the allocation of dollars available for distribution to agency programs.

Time Commitment

Community Investment Volunteers commit to spend 12-15 hours of time over a three-month period.

Activity	Date	Time/Location	Description
Volunteer Orientation	Wednesday, March 17, 2021	9:30am – 11:00am Virtual, Zoom	All new volunteers strongly encouraged to attend training. The training provides new volunteers with an understanding of the Community Investment process and their role and responsibilities. This session includes an update on changes for 2021, a review of the volunteer expectations and time commitment, principles and funding criteria, information on United Way research on community needs and how to review applications.
Subcommittee Meeting #1	Between April 12-15	*TBD Virtual, Zoom (1 hr)	Volunteers complete an extensive review of proposed program funding requests for 2021-2022. This includes a review of all application materials for 3-5 programs. The group will discuss the proposals and formulate questions to be addressed by the agencies prior to the agency presentations.
Agency Presentations	Between April 19-30 (presentations will occur over 2 half-day sessions)	*TBD Virtual, Zoom (8 hours)	Agency leadership will provide a complete and comprehensive presentation about their programs and the need for the amount requested. The agency is directed to allow time for questions and answers.
Subcommittee Meeting #2	Between May 3-7	*TBD Virtual, Zoom (1 hour)	Volunteers will develop funding recommendations, positive feedback, suggestions, and/or concerns to be included in the official award letter sent to each agency.

Financial Review Volunteers (up to 4 hours additional time commitment)

A meeting of Financial Review Volunteers will be scheduled. Financial Review Volunteers serve as a highly valuable resource for United Way and other Community Investment Volunteers by reviewing the financial information of agencies in order to determine their fiscal soundness. CPA's and other individuals with extensive financial expertise are ideal for this role. Financial Review Volunteers provide written summaries of the financial condition of each agency that will aid Community Investment subcommittees in the program evaluation and funding recommendation process.

Financial Review Volunteers may opt to serve solely as a Financial Review Volunteer or may choose to serve as a full Community Investment Volunteer and participate in all meetings of their assigned subcommittee.

Staff Support

To assist Volunteers in fulfilling their responsibilities, a United Way staff person will be assigned to each subcommittee. Staff serves in a liaison capacity between the Volunteers and each agency. They will provide materials to Volunteers before each meeting. It is then a Volunteer's responsibility to study and review the information and ask their subcommittee's staff liaison to send clarifying questions to agency leaders so that an informed recommendation can be made. United Way staff members do not lead subcommittee discussions. This ensures the funding process is driven by volunteers.

Staff support volunteer efforts by:

- Coordinating agency presentations;
- Liaising with agencies to ensure receipt of data that is both accurate and timely;
- Helping to analyze financial and program data from agencies; and
- Assisting in providing options and alternatives to identified issues.