

United Way Volunteer Review Panels

2019-2020 Investments

United Way is currently seeking new panel volunteers to lead the review process for our 2019 Community Investments. Each year, community volunteers generously contribute time and talent to play a leadership role in the review process for United Way certification and funding.

This is a unique opportunity for you to:

- Contribute positively to the community;
- Assure the allocation of funds have the greatest impact possible;
- Learn more about the work of the United Way and local nonprofits;
- Grow personally and professionally and build your network.

This year United Way is changing the investments process to funding in strategic focus areas strictly through Requests for Proposals. The three focus areas are Early Childhood Success, Youth Success, and Thriving Families. Early Childhood Success will be funding programs focused on early learning, the role of parents and caregivers in their children's development, and developmental screenings. Youth Success will be funding out-of-school-time programs and programs that promote social and emotional learning. The Thriving Families focus area has the largest scope as it covers programs that impact family stability (e.g. housing, transportation), well-being (e.g. physical and mental health, food insecurity), financial management (e.g. debts and savings), and employment (e.g. education and income). Because of the large number of proposals expected in Thriving Families, there will be two volunteer panels sharing the responsibility for this focus area.

In addition to the four focus area panels, United Way seeks volunteers for the Financial Review Panel which oversees the agency certification process. This process is used to certify that organizations are in good standing financially and organizationally. Certified agencies are able to apply for grant funding and have other special opportunities.

The following overview provides a sense of what to expect when serving on the Review Panels. Generally, volunteers serve on one of the several panels offered.

Focus Area Funding Review Panels

- **Purpose:** Panelists review program applications for funding. There will be four Focus Area Funding Review Panels: Early Childhood Success, Youth Success, and Thriving Families (Panels A and B).
- **Expertise:** The goal is to have diverse experience and perspective on each Panel. We seek committed volunteers from all sectors and across all career stages who have a passion for giving back and making a difference in our community. In addition, we are seeking a portion of volunteers to have subject knowledge related to the panel they are serving on, but it is certainly not a requirement for all volunteers.
- **Commitment:** Volunteers participate in an orientation and training. Panelists will then read and score applications individually. After the application scoring, volunteers lead in-person agency interviews to learn more about the programs applying for funding and ask additional questions. After the interviews, Panelists will meet to deliberate and make recommendations to the Community Investments Committee.
 - Two panel meetings for training and deliberations (5 hours), a block of agency interviews (6-8 hours), and time to review your panel’s applications.
 - Total estimated time: 20 hours (includes time to review applications independently).

<i>Focus Area Funding Review Panels</i>				
	Early Childhood Success	Youth Success	Thriving Families (Panel A)	Thriving Families (Panel B)
Application Opens	January 7	January 14	January 28	January 28
Panel Training	February 13	February 20	April 5	April 5
Application Submission Date	February 22	March 1	March 22	March 22
Panel Reads and Scores Applications	March 4-21	March 11-28	April 5-30	April 5-30
Block Agency Interviews	March 22	March 29	May 1	May 3
Panel Deliberations Meeting	March 27	April 3	May 8	May 8
CIC Discussion	April 11	April 11	May 16	May 16

**Highlighted dates are when panelists would need to be available for in-person meetings, meeting times are TBD.

Financial Review Panel

- **Purpose:** Panelists review organizations' financials including 990s and independent audits/reviews as part of the agency certification process.
- **Expertise:** Experience with reviewing financial statements is required.
- **Commitment:** Volunteers participate in an orientation and training and are generally assigned about five organizations to review independently. The panel then convenes again to report out findings, which are passed onto the Community Investments Committee.
 - Two in-person meetings (3 hours) plus an independent review of each agency (5-7 hours).
 - Total estimated time: 8-10 hours.

<i>Financial Review Panel (Certification)</i>	
Application Opens	January 3
Submission Date	February 8
Panel Training	February 28
Panel Reviews Portfolios	March 1-20
Summary Findings Meeting	March 21
Chair/Staff Follow Ups	April-May
CIC Recommendations	May 16
CIC Recommendations (Delayed Agencies)	June 13

**Highlighted dates are when volunteers would need to be available for the indicated meeting or activity, meeting times are TBD.

New Agency Certification Panel

- **Purpose:** Volunteers work alongside United Way staff to review organizations' submitted documents and determine if they meet the robust standard in the three core areas of financial health, governance, and performance accountability.
- **Expertise:** Experience with nonprofit operations, governance, leadership, and programming is desired.
- **Commitment:**
 - Two meetings (3 hours) plus site visits to agencies (3 hours) and an independent review of each agency.
 - Total estimated time: 8-10 hours.

<i>New Agency Certification</i>	
Application Opens	January 3
Submission Date	March 8
Meeting 1 (Initial Review)	April 2
Site Visits (Invitation Only)	April 23 & 24
Meeting 2 (Recommendations)	April 25 (phone call)
CIC Recommendations	May 16

Community Accelerator Fund Sub-Committee

- **Purpose:** CIC Committee members create ad-hoc panels from CIC membership to respond to Accelerator fund requests on a rolling basis.
- **Expertise:** CIC committee members
- **Commitment:**
 - Review letters of interest on a rolling basis. Determine if a full application will be requested. Review full applications and meet to deliberate periodically to respond to requests. Time commitment depends on the number of requests and ability to participate in a review quickly (as applications are submitted) is ideal.