

UNITED WAY OF PINAL COUNTY COMMUNITY IMPACT REVIEW PROCESS OVERVIEW

Each year, United Way of Pinal County publicly invites private non-profit tax-exempt human service organizations to apply for funding to serve the residents of Pinal County.

One group of volunteers, who serve on the Basic Requirements Review Team, screen Part One of the applications received, to make sure the organizations qualify to receive funding.

Then Part Two of the applications are given to teams of Community Impact Review Team volunteers, who review the applications to make sure their programs fit in to the United Way of Pinal County Community Impact Plan, work efficiently and effectively, and will make a difference in the lives of the people they serve.

The volunteers may also choose to interview representatives from the applicant organizations, or even perform a site visit of the organization. The 2007 teams are organized according to our priority areas: Self-Sufficiency, Services to Seniors, Domestic Violence and Adult Literacy.

The volunteers meet to decide how much money will be granted to a program, using the “checkbook” method. They also may decide to place certain restrictions or reporting requirements on the organization.

The volunteer teams send their funding recommendations to the United Way of Pinal County Community Impact Committee of the Board of Directors. *This Committee irons out any issues, such as overlap of services, and submits a funding plan to the full United Way of Pinal County Board of Directors for final approval.* The Board reserves the right to reject a review team’s recommendation, but this does not happen without the Board explaining why, to the review team.

FOR REVIEW TEAM MEMBERS: STEP-BY-STEP THROUGH THE REVIEW PROCESS.

As a Community Impact Volunteer, here’s what you can expect:

BEFORE THE TEAM MEETING

1. Read the Funding Guidelines. The second part tells you about what United Way funds or doesn’t fund.
2. Read the Community Impact Plan. This gives you information on what our goals and expected outcomes are, and what strategies we intend to use.

3. Read the “Instructions On How to Complete the Application”. This is the same set of instructions the applicants use to complete the application. This gives you an overall understanding of the application questions and the kind of information we are looking for.
4. Briefly scan the applications you’ve been given to review. Get a feeling for how the different applications compare.
5. Now go back and thoroughly read the applications. As you are reading, you should refer to the Instructions On How to Complete the Application and a blank Scoring Sheet in front of you. (You’ll need a blank Scoring Sheet for each app you review – print them out from the website, or make photocopies from your hardcopy packet).

THE SCORING SHEET

6. Complete a scoring sheet for each application. You’ll need to do this before you come to your meeting. Fill in the name of the agency and the name of the program that you are reviewing at the top of each Scoring Sheet. Please don’t write your name or other identifier on your Scoring Sheet.

Each application question has been assigned a point value, which is indicated on the application and the Scoring Sheet. There are up to 100 points available.

Enter in the “Your Score” lines on the Scoring Sheet your score for each answer. Write down any brief comments you may have, in the spaces provided. You may also jot down any questions or points of discussion you may want to bring up at the review meeting.

Add up your scores and enter in to the Total Score line on the Scoring Sheet for each application.

7. Bring your Scoring Sheets and all your application paperwork to your meeting.

AT THE MEETING

There will be time at the start of the meeting to meet other team members, go over the process, answer any procedural questions and sign and hand in your Volunteer Commitment Form, if you haven’t already.

Your team facilitator will be a member of the United Way of Pinal County Board of Directors.

Your facilitator will go through each application, item by item, and ask for any questions you may have. Please use this time to ask the questions you may have. We also ask that you keep up with the facilitator – there’s a lot of ground to cover, and you should have already read your materials.

It is OK if you want to change any scores on your Scoring Sheet, based on the questions and discussion that may come up during the meeting.

There is a possibility that not all of the apps can be reviewed at one meeting. That’s why we’ve set aside a second meeting time, just in case. The team may also decide to invite an agency representative to come to Meeting #2, prepared to answer any questions the team may have.

When review and discussion on each app is completed, whether at Meeting #1 or #2, the facilitator will collect the Scoring Sheets. The Total Scores will be added up and averaged. When all the discussion and scoring is done, the average score for each application will be posted for all to see. For example, the posting may look like this:

<u>Agency</u>	<u>Program</u>	<u>Ave. Score</u>	<u>Req. Amt.</u>	<u>Recd Last Year</u>	<u>This Year</u>
ABC Agcy	Outreach	42	\$15,000	\$8,000	
DEF Agcy	Education	31	\$15,000	\$10,000	
GHI Agcy	Emgcy Svcs	27	\$20,000	(New prog.)	
JKL Agcy	Case Mgt.	15	\$10,000	\$10,000	

THE CHECKBOOK METHOD

Each team is assigned a theoretical “checkbook” – a dollar amount fixed by the United Way Board of Directors in advance of the review process, based on funds available and United Way funding priorities. Experience has shown that dollars requested always exceed dollars available for distribution. So, your task as a review team volunteer is to distribute the funds available in your checkbook to those programs which appear to deliver the most favorable outcomes.

Step 8. As a team, use the “checkbook method” to assign dollar amounts to each application. Your facilitator will help you through this process, and post the recommended totals for all to see, in the This Year column.

Here are the guidelines you should use to help you decide how to distribute the funds from your checkbook:

1. You can’t spend more than what’s in your checkbook.

2. You can decide to spend less than what is in your checkbook. The “extra” dollars are returned to the United Way Board of Directors Community Impact Committee for distribution elsewhere.
3. Programs which have earned the highest average points on their application will tend to get a greater percentage of the money they are requesting.
4. Programs which have earned the least average points stand the greatest chance of receiving cuts in their funding request, or getting no money at all.
5. Avoid spreading a reduction in funding evenly across all applications because “they are all doing such a good job”. This takes money away from the most effective programs and rewards the less effective programs.
6. Just because an agency received funding in previous years is no guarantee that they should continue to receive funding.
7. Be conservative in your funding decisions. If it were your money, would you invest it in this program?

Step 9. Arrive by consensus at the dollar amounts the team will recommend to the United Way Community Impact Committee. Your facilitator will help you with this discussion.

Your facilitator will ask you to give objective reasons why you think one application is better or worse – refer back to the low or high scores you’ve given. These reasons will be recorded and provided to the applicant by United Way staff for feedback on their applications.

Your facilitator will also ask if you want to place any restrictions on funding or extra reporting requirements on programs you choose to fund. Any restrictions or requirements are included in United Way’s contract with the recipient agency.

Step 10. Hand in all your application paperwork at the completion of the review process.

Thank You!