



United Way of Kankakee
& Iroquois Counties

Community Investment Volunteer Expectations

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 Organizations as well as the accountability and integrity of United Way.

Individuals employed by applicants are ineligible to serve as Community Investment Volunteers. Volunteers who serve on an applicant program's board of directors or who are closely associated with an affiliate are ineligible to serve on the subcommittee assigned to evaluate that program'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 assigned program Site Visits.
- Review grant applications to obtain a clear understanding of the 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 applicant programs.

Time Commitment

Community Investment Volunteers commit to spend 8-12 hours of time over a three-month period.

Activity	Date	Time/Location	Description
Volunteer Orientation	Week of March 20 -24	*TBD Virtual, Zoom (1 hr)	All 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 2023, 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.
Review Assigned Applications, Guiding Questions and Evaluation Form	Between April 10-17	Independently (1 hr)	Volunteers complete an extensive review of proposed program funding requests for 2023-2024. This includes a review of all application materials for 3-5 programs. The volunteer will review the applications and formulate questions to be addressed by the applicant prior to the program site visits.
Program Evaluation Site Visits	Between April 24-28	*TBD Virtual, Zoom OR in-person @Program Site (3+ hours)	Applicant leadership will provide a complete and comprehensive presentation about their programs and the need for the amount requested. When possible, applicant will also provide a tour of the program site for volunteers. The applicant is directed to allow time for questions and answers.
Complete Online Evaluation Form	Due May 1	Independently (1 hour)	Volunteers will develop funding recommendations, positive feedback, suggestions, and/or concerns to be included in the official award letter sent to each applicant.
Financial Review Subcommittee Volunteers	Between May 8-12	*TBD Virtual, Zoom (1 hour)	Finance Subcommittee Volunteers will develop funding recommendations, positive feedback, suggestions, and/or concerns to be included in the official award letter sent to each applicant.

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 each applicant 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 applicant 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 volunteers & subcommittee. Staff serves in a liaison capacity between the Volunteers and each applicant. 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 the applicant so 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 Program Site visits.
- Liaising with applicants to ensure receipt of data that is both accurate and timely
- Helping to analyze financial and program data
- Assisting in providing options and alternatives to identified issues.