COMMUNITY INVESTMENT FUNDING GUIDELINES

UNITED WAY
Greater Lafayette

Investment Guidelines are established to help the Community Investment Committee (CIC) carefully assess each United Way partnership to determine whether an agency has demonstrated alignment to United Way of Greater Lafayette's strategic goals, provides measurable program data, and demonstrates fiscal stability. With these guidelines as the basis for funding decisions, volunteers can ensure donors that their contributed dollars are well-spent.

1. STRATEGIC ALIGNMENT

Does the program serve populations identified as underserved or at risk? Is there a clear demonstration of service demand? How well do the agency's programs and services align with the Cradle to Career Commitment and Basic Foundational Needs? Is there a strong connection between the service's objectives and UWGL's priority areas?

2. DUPLICATION OF SERVICES

Has the organization collaborated with or consulted other service providers to ensure efforts are complementary rather than duplicative? Are there other organizations offering similar programs or services in the same geographic area? What data (e.g., needs assessments, demographic studies, community surveys) support the existence of this unmet need?

3. COLLABORATION

Does the program have formal or informal meaningful partnerships (beyond referrals) with other organizations (e.g., nonprofits, government agencies, businesses, schools)? Does the program have a process for referring participants to other services they may need? Is the program maximizing existing community resources (e.g., space, funding, staff expertise, volunteers)? How does the organization collaborate to reduce costs and improve service delivery (e.g., shared facilities, joint funding applications, referral networks)?

4. MEASURABLE OUTCOMES

Are the program's goals and objectives clearly defined and measurable? Is the organization measuring outcomes that align with the organization's priorities and goals? Are the established goals reasonable for the size and scope of the organization? How does the program's effectiveness compare to similar initiatives in the community or sector?

5. FINANCIAL CONITION

Does the organization have a stable financial history, or are there signs of financial distress? Are there sufficient cash reserves or endowments to cover unexpected expenses? Does the organization have other revenue inputs independent of UW (fundraising, billing, etc.)? Are audited financial statements available, and do they show clean audit opinions? Are there strong financial controls and reporting systems in place? Is the proposed budget clear, detailed, and aligned with the organization's mission? Do revenue and expenses appear reasonable and well-justified?

6. BOARD GOVERNANCE

Is board engagement appropriate based on the size and scope or the organization? Does the board include individuals with diverse skills (e.g., legal, finance, nonprofit management, marketing)? Is there a process for recruiting, onboarding, and training new board members? Does the board reflect the community and population the organization serves?

7. INVESTMENT IMPACT

Does the application provide clear data (e.g., financial statements, gap analyses) to justify the need for UW funding? Is there a detailed breakdown of how funds will be used (e.g., personnel, materials, operational costs)? How critical is UW funding to the organization's capacity to deliver its mission? How vulnerable is the organization to changes in UW funding levels?