

COMMUNITY INVESTMENT PROCESS



1. VOLUNTEER RECRUITMENT

United Way's allocations process starts by bringing together a committee comprised of individuals who live and work in the Greater Lafayette area. These volunteers serve as the eyes and ears of the more than 13,000 donors. Volunteers participate in a 12-month process to ensure that funds are distributed fairly, objectively, and with great consideration for their best use.

2. VOLUNTEER EDUCATION/TRAINING

Volunteers learn about the importance of building a stronger community by investing in a system of quality agencies that help people in need. Training includes an overview of key issues in our local community, the Cradle to Career Continuum's role in addressing community challenges, the allocations process, and the Community Investment Funding Guidelines. Each nonprofit is required to meet the standards to maintain United Way membership and receive funding.

3. SITE VISITS/REPORTING

Volunteer groups are dispatched to visit United Way member agencies. They conduct an annual in-depth review of the agencies through site visits, and review reports submitted by the agencies.

4. DEBRIEFING

Following the site visits, volunteers meet to discuss their findings about each agency. They also develop specific recommendations for improvement to help agencies stay stable and strong.

5. ALLOCATIONS

Agencies request funding based on their particular needs and programs. Based on the knowledge gained through the allocations process, volunteers now must come to consensus about how much money each agency will receive in the coming year. Volunteers determine funding based on the merits of the requests and the capacity of the agencies and the Community Investment Funding Guidelines. While allocations vary greatly depending on agency size and impact, United Way volunteers invest more than \$5 million in Greater Lafayette each year.

6. APPROVAL & DISTRIBUTION

Once all of the allocation recommendations are compiled, they are vetted through a three-step approval process. The Community Investment Committee submits recommendations to the United Way of Greater Lafayette Executive Committee for review. Once the recommendations have passed review, the Executive Committee presents recommendations to the Board of Directors for final approval. Following approval, funds are distributed to the agencies in the next fiscal year.