United Way of Pettis County Allocation Policy

Purpose
The purpose of this policy is to define the process of funding the Pettis County partner agencies served by the United Way of Pettis County, consistent with the changing needs of the community. This policy establishes the guidelines and procedures used to fulfill its purpose with effectiveness, efficiency and accountability. It is the responsibility of the United Way of Pettis County Board of Directors to determine the current priority needs of the community and to assign commensurate levels of funding, based on the campaign dollars raised.

Definitions
Allocations Committee: Members of the Board of Directors assigned on an annual basis to execute the policies and procedures of the allocation process.

Ad Hoc Members: Community members recruited from a cross section of the community to assist and actively participate in the allocation process.

Impact Areas: The United Way of Pettis County has impact areas which reflect the changing needs of the community. At present, there are three Impact Areas: Youth Opportunity, Healthy Community, and Financial Security.

Outcome-Based Performance: Criteria by which agencies are measured as to their effectiveness of service and accountability to the community. These criteria are established and periodically reviewed on an agency- by-agency basis with continuous feedback through the United Way Executive Director, Allocations Committee, and Board of Directors.

What You Need to Know to Complete Application:
The United Way of Pettis County Grant application will be available each Fall on the United Way of Pettis County website, www.spcuw.org.

Pettis County Service Providers who wish to apply for a United Way of Pettis County grant will have access to download the following tools to assist with a successful grant application.

- Grant Scoring Rubric
- Allocation Policy
- Agency Reporting Expectations
- UWPC Agency Agreement
- Example Project/Program Budget

How Applications Will Be Assessed
United Way of Pettis County Allocation Committee will be utilizing the Grant Scoring Rubric to determine the quality of application submitted. When information is missing or the Allocation Committee has additional questions, the UWPC staff will follow up with the grant applicant for the additional information. This information will be submitted to the Allocation Committee. The initial score of the application can be altered after additional information is provided. The additional information will help the Allocation Committee determine if the service provider will be a grant recipient.

Assessment Procedures

Step 1- Sort the grant application score from highest to lowest.

Step 2- Add another column to the worksheet and determine the percentage from the application total score. i.e. 96 points is 96% if the total score on the application is 100.

Step 3- Multiply the total score percentage by the requested amount.

Step 4- Review prior year reporting criteria. Were the funds that were distributed invested in what the service provider reported in the grant application?

Step 5- Review the percentages. Committee will determine if the totals need to be adjusted based on campaign totals, applicant performance, amount of request, and purpose of project/program.

- New Applicants- new applications that score 50% or below will result in no funding. The UWPC staff will meet with the service organization to share where they could become stronger if they choose to apply for next year funding.
- Returning Applicants- returning applications that score 50% or below will be placed on probation for one year. Service organizations will be expected to increase their total grant application score. If the performance is not improved, they will not receive funding the next grant year.
- Service providers that are 100% volunteer led, with no paid employees, will have an additional 10 points added to their final score.

Step 6- The Allocation Committee will meet to review the data to determine awarded grant allocation. A recommendation will be made to the Finance Committee.

Step 7- All members of the board will be invited to the Finance Review Committee in January each year to review the Allocation Committee recommendations. A final determination for awarded amounts will be made.

Step 8- The final determination will be presented at the January Board meeting for vote.

Step 9- An official Agency Agreement with awarded amount will be emailed to the Service Provider for signature following the January Board Meeting.