



United Way of
Southwestern Indiana

Community Investment Panel Volunteer

Purpose: Ensure that the resources United Way invests in programs of partner agencies aligns with United Way's goals, shows measurable results, and changes conditions in the community.

Membership: 7-11 members

Term limits: Open

Meetings: Annual Orientation, Packet Review meeting, Agency Site Visit, Investment determination meetings (1-2 meetings as needed), De-brief at end of process

Duties and Responsibilities:

- Attends meetings and training sessions
- Keep information about the Partner Agencies and their programs confidential when necessary
- Avoid of a conflict of interest, real or perceived, in deliberations, recommendations and decisions regarding investment of funds
- Must be open minded, fair, consistent and willing to embrace new process
- Use common set of questions for each agency site visit to ensure consistency and to achieve United Way's goals
- Compare data from year to year to determine progress on outcomes
- Make final investment recommendations based on available funds and present to United Way CI Cabinet
- Be prepared to support funding recommendation to CI Cabinet based on outcomes, collaboration and United Way goals
- Report any concerns, questions to CI Cabinet for further review or follow-up
- A current donor to United Way of Southwestern Indiana

Benefits:

- Free professional training
- Gain or build upon valuable knowledge of local community resources offered by non-profit agencies
- An opportunity to serve your community and LIVE UNITED

Volunteers are asked to disclose any affiliations that might jeopardize impartiality, and to accept warranted assignment changes. Volunteers are exposed to highly sensitive agency information. Respect for the agency and for the United Way should always outweigh any desire to share confidential information outside of the Community Investment process.

Panel Volunteer Training for all volunteers (Attend one session)

- March 7th, 2017 from 12-4pm @ United Way Boardroom
- March 17th, 2017 from 8:30- 11:30 am @ United Way Boardroom
- March 23rd, 2017 from 2:00- 5:00 pm @ United Way Boardroom

April 10th- May 12th, 2017 – Phase 2

Panels conducting meeting & site visits

May 17th- June 1st, 2017

Panel Presentations (Panel Chair & Co-Chair attend)

July 1st, 2017

New Focus Area Funding begins