



United Way of Trail & District Allocation Process & Funding Guidelines

ALLOCATIONS PROCESS

1. Each year agencies are required to submit to the United Way relevant statistical information including financial statements. They must also submit an information update and program funding request and budget.
2. Allocations are predicated on the understanding that each Agency is governed by a duly elected volunteer board authorized to determine Agency programs, services, operational policies and budgets.
3. The United Way has the responsibility and authority to allocate funds entrusted to it by donors in a fair and equitable process that involves a thorough review of each Agency's operations and finances. The object of the process is to determine a funding level that is appropriate in light of competing needs and interests of all Agencies and the priorities of the community.
4. Prior to any final decision with respect to allocations being made by the United Way Board (generally at the December Board meeting) all Agencies will be required to participate in an allocation interview. At this time, the Agency will have an opportunity to make a brief presentation, provide feedback on the role of the United Way and to respond to questions the allocation committee may have.
5. Agencies will be informed of the results of the allocation budget following the December board meeting. First stage of funding to be distributed after January 15th annually, with the second stage of funding to be allocated in June of same year.



GUIDELINES FOR APPLICATION

Program Based Funding Submissions

Program Funding Model

This allows agencies to apply directly for funding for specific programs or projects. This allows the United Way to focus on programs where our assistance is needed and to better evaluate the effectiveness of our allocations.

What is a Program?

This is a type of service or activity delivered to a person/group to address a specific problem, condition, and need in the community. Some programs may be very specialized or organizations may provide a variety of services to a large segment of the community.

Application for New Programs

One of the key reasons for moving to program funding, as opposed to zero-based funding, is that it allows United Way to look more clearly at individual programs having the greatest impact on our communities. The United Way does recognize however, the importance of maintaining and sustaining the operational aspects of the agency. Duplication of programs already funded by United Way will have the lowest priority.

Evaluation and Outcomes

The ability of an organization to evaluate the outcomes and effectiveness of a service program is extremely critical in this period of scarce resources. Programs, which do not clearly identify their accomplishments and how they address people's needs, will not be able to compete effectively for funding. Donors demand a very high degree of accountability for their funds and clear statements of outcomes to justify their continued support.

Tracking Service Delivery by Municipality

Fairness and accessibility in the delivery of services is an issue. United Ways commitment is to work towards providing needed services in municipalities throughout its area of responsibility. For this reason, it is essential that agencies be able to clearly identify the communities they serve and the use of services within those communities. Again donors want to know how their communities benefit from United Way funding.