

## United Way of Central Oklahoma

### Community Investment Volunteer Expectations

A Community Investment Volunteer must, at a minimum, be a United Way donor who is willing to fulfill the time commitment. Individuals employed by a United Way of Central Oklahoma Partner Agency are ineligible to serve as Community Investment Volunteers.

#### Financial Commitment

Community Investment Volunteers should have a vested interest in the success of United Way's Partner Agencies and the accountability and integrity of United Way. Therefore, Community Investment Volunteers must themselves be contributors to United Way of Central Oklahoma's Annual Campaign.

#### Time Commitment

Community Investment Volunteers commit to spend 20-25 hours of time over a five-month period (approx. 7 hours reviewing materials; approx. 18 hours participating in training, meetings, and site visits). Meetings and site visits occur during regular business hours. See Volunteer Calendar for more details. This time commitment is important in order to fulfill the role and responsibilities to United Way and its donors.

#### Role & Responsibilities

A Community Investment Volunteer's role and responsibilities are to:

- Make every effort to attend **all** meetings **and** site visits;
- Review financial and program reports from Partner Agencies to obtain a clear understanding of the Partner Agency programs and operations;
- Monitor the adherence to the Policies and Procedures of the United Way;
- Monitor the quality and success of Partner Agency programs;
- Report critical observations or concerns to Partner Agencies for their improvement;
- Identify and recommend possible collaborations that might result in a more efficient delivery of service;
- Prepare recommendations for the Community Investment Committee to present to the United Way Board of Directors regarding the allocation of dollars available for distribution to Partner Agency programs.

#### Volunteer Assignment & Tenure

Approximately 12-15 Volunteers are assigned to each Subcommittee. A Volunteer may serve a total of three (3) consecutive years on the same Subcommittee. The Volunteer may move to another Subcommittee or to another area of responsibility. Volunteers must renew enrollment on an annual basis. Consideration for continued participation is given by the length of tenure, attendance, number of Volunteer applicants from a single company, and continued interest in volunteering.

#### Conflict of Interest Policy

***Volunteers who serve on a United Way of Central Oklahoma Partner Agency's Board of Directors or who are closely associated with an affiliate are ineligible to serve on the subcommittee that monitors that agency.*** It is important for all Volunteers to review United Way's Disclosure/Ethics Statement.

# United Way of Central Oklahoma

## **UNITED WAY OF CENTRAL OKLAHOMA DISCLOSURE/ETHICS STATEMENT**

*Decisions at United Way of Central Oklahoma are made by individuals of the highest character who are concerned about the well-being of their community and those who live there. Policy-making volunteers include central Oklahoma's top business, labor, civic, and cultural leaders. Many of these individuals have leadership roles in other organizations. If a vote on an issue at United Way affects one or more of those organizations and a Volunteer feels that his or her vote is or may be construed to be a conflict of interest with other responsibilities, he or she may abstain from voting on that issue.*

Annually, each Volunteer is asked to sign United Way's Code of Ethics document to affirm their understanding and support of the standards included within that document.

### **Further Community Investment Volunteer Opportunities**

#### Co-Chair Job Description:

There will be two Co-Chairs per Subcommittee. It is recommended that Community Investment Volunteers wishing to serve as Co-Chair have served on a preferred minimum of two (2) Subcommittees and/or for a period of three (3) years before eligible. Co-Chairs serve for a maximum term of three (3) consecutive years and until their successors are selected. A Co-Chair may serve the maximum 3-year term, but then will not be eligible to serve as a Co-Chair for a period of one (1) year. The role of the Co-Chair is to lead the Subcommittee through the Community Investment process including but not limited to: agency budget reviews, site visits, comments and concerns for agencies, agency relationship building, and funding recommendations. Once the Subcommittee has developed funding recommendations, the Co-Chairs present these recommendations to the Community Investment Committee at Exit Conferences. NOTE: Co-Chairs will be asked to participate in additional meetings, thus requiring additional time commitment.

#### Financial Review Volunteers (minimum 4 hour separate/additional time commitment)

A meeting of Financial Review Volunteers will be scheduled. This meeting will last approximately four (4) hours. Financial Review Volunteers serve as a highly valuable resource for United Way and other Community Investment Volunteers by reviewing the financial information of Partner Agencies in order to determine their fiscal soundness. CPA's and other individuals with extensive financial expertise are ideal for this role. The result of the Financial Review Volunteers meeting are written reports/summaries of the financial condition of each Partner Agency to present to the Community Investment subcommittees to aid in their review and funding recommendation process. Financial Review Volunteers may enroll solely for the Financial Review Volunteer meeting or may choose to serve as a full Community Investment Volunteer and participate in all meetings of their assigned subcommittee. (See complete Financial Review Volunteer Job Description for further information.)

#### New Agencies and New/Expanded Programs Subcommittee Description:

The purpose of the New Agencies and New or Expanded Programs Subcommittee is to review applications from New Agencies applying to become a United Way Partner Agency, or from current Partner Agencies that want to obtain funding for an additional or expanded

## United Way of Central Oklahoma

program. The Subcommittee will review applications to ensure they meet established guidelines and criteria, and will make funding recommendations to the Community Investment Committee. *NOTE: This subcommittee has a slightly different schedule than that of other subcommittees.*

### **Staff Support**

To assist Volunteers in fulfilling their responsibilities, a United Way staff person will be assigned to each Subcommittee. Staff serves in a liaison capacity between the Volunteers and the Partner Agency. They will provide materials to Volunteers before each meeting. It is then a Volunteer's responsibility to study and review the information and ask their Subcommittee's staff liaison to send clarifying questions to Partner Agency leadership so that an informed recommendation can be made.

Staff supports volunteer efforts by:

- Coordinating Partner Agency visits and Subcommittee meetings;
- Providing consultation to Partner Agencies to ensure receipt of data that is both accurate and timely;
- Helping to analyze financial and program data from Partner Agencies; and
- Assisting in providing options and alternatives to identified issues.