

## ALLOCATIONS COMMITTEE VOLUNTEER POSITION DESCRIPTION

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### CONTEXT

'Allocations' is the process United Way Hastings & Prince Edward uses to allocate funds to agencies and programs. The 2022 Call for Proposals (CFP) is designed to solicit Requests for Investment (RFI) and proposals from eligible service delivery partners which support the achievement of United Way HPE's Community Impact Pillars.

The proposal is an opportunity for non-profit organizations aligned to our Community Impact Pillars and priorities and who meet our eligibility criteria to apply for funding to support programs that have measurable impact in the community.

### PURPOSE OF VOLUNTEER POSITION

Allocations Committee Volunteers act on behalf of the community to review, evaluate, and rank Requests for Investment (RFI) submitted by applicant agencies as part of the 2022 Call for Proposals and make funding recommendations to the United Way HPE's Board of Directors. This process is guided by United Way HPE's Community Impact staff team.

Allocation recommendations are completed by community-based volunteers trained in the process of review and evaluation. They work in teams of 4 -5 people, to determine each application's alignment with United Way priorities. Recommendations for funding are then made to the Board of Directors.

The process consists of:

- An independent review of the submitted online applications
- Group discussion to determine application alignment, eligibility for funding, and informational gaps that need to be filled for the team to make a final decision
- A series of questions and answers between the volunteer teams and the applicant agencies
- The potential for face-to-face or virtual meetings between the volunteer teams and the applicant agencies

### RESPONSIBILITIES

- Attend a Citizen Review Panel training session
- Thoroughly review and Rank 10 to 15 RFIs
- Attend 6-12 CR assessment team meetings to assess the RFIs
- Rank and make funding recommendations for each RFI as an individual and as a team
- Contribute to discussions regarding the ranking of proposals reviewed by other volunteers
- Contribute to decisions on team ranking and funding allocation for each proposal

### TIME COMMITMENT

The estimated monthly time requirements are as follows:

**December 2022 - February 2023**

- Evaluation training - 2-3 hours
- Individual RFI review - 10-12 hours

- Citizen Review Panel Assessment Team Meetings - up to 15 hours
- Agency follow up questions and meetings - 3-5 hours

Total commitment over 3 months: up to 35 hours

## QUALIFICATIONS

Applicants should possess one or more of the following:

### Experience, Knowledge, Skills and Abilities

- Local community development experience
- Background in evaluation/allocations
- Federal/Provincial ministry/municipal/sector experience/background/knowledge
- Understanding and knowledge of non-profit sector
- Ability to assess from a "system perspective"
- Organizational and time management skills
- Self-motivated and self-reliant to work effectively in a virtual environment as well as a team environment
- Analytical/critical thinking skills: providing thoughtful and objective evaluations based on established criteria
- Knowledge of or expertise in organizational and governance operations.
- Knowledge and expertise in the interpretation and analysis of financial information
- Commitment to United Way's desire to achieve measurable impact in the community

### Term

- This position is a one, two- or three-year term with a maximum of 6 consecutive years served on the Citizen Review Panel.

### Benefits to Volunteer Role

- Increase knowledge of United Way Hastings & Prince Edward
- Opportunity to volunteer for a dynamic community organization
- Contribute to making our community stronger, healthier and safer for all
- Contribute to ensuring we invest where our community needs it most and where together we can achieve the greatest results
- Network with United Way Hastings & Prince Edward staff and volunteers and partners