

# Communication Guidelines for Community Partners

United Way invests in program results that align with the focus areas of Education, Income, and Health. A clear channel of communication between United Way and the community partners that produce these results is needed for a successful application process to take place and for a solid partnership to be maintained.

The purpose of this document is to define the opportunities for communication between United Way and potential and currently funded community partners.

## Communication Opportunities

### Potential Funded Partners (Applicants)

- The process for becoming a funded community partner with United Way begins with the Request for Proposals (RFP) released by United Way each November. The RFP provides a detailed overview of what United Way wishes to invest in for the upcoming fiscal year. *(first official communication of the application process)*
- All potential applicants (including those with currently funded programs) are required to attend one of two orientation sessions. These mandatory sessions provide a thorough overview of all information needed to complete the application process. Attendees are encouraged to ask questions at the orientation and to not leave the orientation with any uncertainty as to the requirements, obligations, timeline, etc of the application process. *(second official communication of the application process)*

To ensure clarity and fairness for applicants, all information provided at the orientation regarding the application process (deadlines, submission requirements, etc) is final.

- After attending the orientation, potential applicants are encouraged to call or e-mail Community Investment Department staff with any questions about the application process. Applicants may ask staff for guidance related to specific application questions. Receiving staff guidance does not guarantee funding. *(third official communication opportunity of the application process)*

### First-time Applicants

- All organizations that wish to submit an application for a program not currently funded must complete a Letter of Intent (LOI). The instructions for completing the LOI are provided at the orientation session. Applicants required to submit a LOI are encouraged to call or e-mail Community Investment Department staff with any questions. *(second opportunity for communication specifically about the LO process - the orientation is the first)*
- Staff and volunteers will review all LOIs after the submission deadline to determine which programs can proceed with the application process. Both Community Investment Department staff and United Way volunteer leadership must be in agreement for a program not to be allowed to continue in the application process. Staff will contact each organization that submitted an LOI within 2 weeks of the submission deadline to inform them whether or not they can proceed with the application process. *(third official communication of the LO process)*

### During the Application Review Period

The process for investing Community Fund dollars is designed to ensure thorough and careful consideration of funding proposals by United Way volunteers. This process lasts from early February until the third week in May.

- Details concerning the review and evaluation of applications will be provided at the orientation sessions referenced above. However, applicants are encouraged to contact Community Investment Department staff if they have any questions about the application review process. This “open door” policy provides an ongoing opportunity for applicants to have questions answered during the review process.
- United Way volunteers are given the opportunity to ask follow-up questions to all applicants as part of the program review process. This provides another chance for communication to take place and to achieve clarity.

### After Funding Decisions Have Been Made

- Final investment decisions are made by the United Way Board of Directors at its quarterly meeting on the third Wednesday in May. After the meeting has adjourned, the Community Investment Department staff will send an e-mail to the Executive Director/CEO and Board Chair of each applicant organization providing the funding decision for each program. *(first communication after funding decisions have been made)*
- A cover letter and Statement of Agreement (contract) will be sent within one week of the May Board meeting to all organizations with one or more programs approved for funding. The letter and contract provide all of the information needed to successfully enter a formal funding partnership with United Way. *(second communication with organizations that are offered funding)*
- A letter will also be sent to organizations that have no programs selected for funding. This letter will provide an overview of the decision process and will serve as official documentation of the funding decision. United Way staff contact information will also be provided. *(second communication with organizations that have no programs selected for funding)*

### Questions or Concerns about Funding Decisions

- United Way staff will survey all applicants after funding decisions are made. This survey will provide applicants with a chance to provide general feedback on the application process (i.e. instructions, forms, communications, timeframe, etc).
- United Way staff may initiate contact with the Executive Director of an applicant organization if an in-person meeting is deemed necessary to discuss a funding decision.
- United Way Board decisions are final. However, all organizations (selected to receive funding or not) that have questions or concerns about funding decisions are encouraged to contact the United Way staff during the 30-day comment period that follows the May Board meeting. This comment period is based on the following guidelines:

- Executive Directors who wish to gain clarity about why one or more programs were not funded at the level requested should contact the Community Investment Director.
- Executive Directors that wish to voice a complaint or feel their application(s) did not receive fair consideration should contact the President/CEO of United Way via telephone within 30 days of receiving notice of United Way's funding decision.
  - Based on the concerns presented during the initial phone conversation, either the United Way President/CEO or the Executive Director of the applicant organization can request an in-person meeting to take place.
  - If such a meeting occurs, the Executive Director/CEO and Board Chair (or designee) of the applicant organization and United Way must be in attendance.
  - The meeting must take place within 30 days of the initial telephone conversation.
  - The purpose of the in-person meeting is to gain clarity and to ensure that all perspectives are heard. Funding decisions are final and are not open to appeal.
  - All in-person meetings will be summarized and presented at the next meeting of United Way's Community Fund committee, Executive Committee, and Board of Directors to ensure that United Way volunteers are aware of all concerns.
  - The United Way CEO and Board Chair will consult with the United Way Executive Committee if they determine next steps of any kind should be considered.

## **Communication with Funded Community Partners**

### Ongoing

United Way staff offer an open-door for communication with our partners throughout the year. Partners are encouraged to contact staff at any time to ask questions, provide updates, or gain clarity on any topic. United Way staff is particularly interested in consulting with partners to discuss their program results and how program results can be best aligned to support United Way's efforts. The United Way staff is dedicated to supporting the success of our partners.

### Organization e-mail

The Community Investment Director will send an e-mail twice monthly (on average) to Executive Directors and key program staff. Executive Directors can request that employees be added to this list at any time.

This e-mail will include upcoming training opportunities, fundraisers, job opportunities, funding opportunities, etc. Funded community partners are encouraged to submit information for inclusion in this e-mail. It is suggested that date-specific items be submitted well in advance of any deadlines. All submitted items must be relevant to the larger nonprofit community.

## Website

United Way is committed to maintaining an up-to-date website. Funded community partners will receive a username and password that enables them to access the Community Partner Handbook, United Way logos, etc on-line.

## Organization Executives Association meeting

The Executive Directors of funded community partners convene quarterly on the second Wednesday of February, May, August, and November from 8:30 – 10:00 a.m. United Way staff attends these meetings as guests of the group. Attendance is voluntary. The agenda for these meetings are set by the chairperson with input from association members.

The chairperson of this committee sits on the United Way Board of Directors.

## **Contact Information**

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## Community Investment Department

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## Community Fund Committee Chair (volunteer)

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